

HELPERS GUIDE

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**A GUIDE FOR HELPERS TO ASSIST
CLIENTS WHEN APPLYING FOR
SKILLS DEVELOPMENT PROGRAM**

Alberta
STUDENTS FINANCE

Revised July 1996

HELPERS GUIDE

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SKILLS DEVELOPMENT CHANGES FOR 1996/97

ORGANIZATIONAL CHANGES

Teacher Assistance Offices

- An organizational consolidation has occurred within the Department and a new structure has emerged called the Teacher Assistance Offices (TAOs). TAOs bring together the Academic Planning Office and the Career Development Centres.

Decentralized Service

- One of the outcomes of this consolidation has Students' Finance will be providing a more decentralized service. All of the Career Development Centres (CDC) have become an integral part of the new delivery of student assistance.
- The CDC's now have moved to Students' Finance with a strong focus on financial assistance.

SECTION ONE

SKILLS DEVELOPMENT PROGRAM CHANGES FOR THE 1996/97 YEAR

Meeting Clients' Needs Now and in the Future

- Several changes have been made to accommodate clients' needs and to ensure that the Skills Development Program is meeting its goals. The implementation of the program will be changed to:

Electronic Filing

- Electronic filing will improve processing time drastically enabling students receive their Notices of Assessment in a more timely way. Electronic filing will not be available for the 1996/97 academic year, but our application forms have been revised this year to support the implementation of the new processes required for direct file only.

IMPORTANT NOTE

Stirling Place Information Services

- Information services will be available in Edmonton at Stirling Place until September 30, 1996 only. Front-line staff will then be relocated to the Edmonton CDC and there will be no public entry or phone service available at Stirling Place. The extended phone service will continue to be available province-wide, 7 days a week and 24 hours a day.

SECTION ONE

SKILLS DEVELOPMENT PROGRAM
CHANGES FOR THE 1996/97 YEAR

SKILLS DEVELOPMENT CHANGES FOR 1996/97

ORGANIZATIONAL CHANGES

Learner Assistance Division

- An organizational consolidation has occurred within the department and a new structure has emerged called the Learner Assistance Division (LAD). LAD brings together the Students Finance Board and the Career Development Centres.

Decentralized Service

- One of the outcomes of this consolidation is that Students Finance will be providing a more decentralized service. All of the Career Development Centres (CDC) have become an integral part of the new delivery of student assistance.
- The CDC's now have access to Students Finance information systems and will be able to provide that information to students all over the province. Students now do not have to rely on Edmonton and Calgary Students Finance offices for service and information.

Redesign of Business Processes

- Students Finance has undertaken a redesign of its business processes. A common theme throughout this re-engineering is that Students Finance processes must be focused on the client. Today, our clients want faster access to more information, quicker application turn around time, less paper and less bureaucracy.

Meeting Clients' Needs Now and in the Future

- Several things are happening to accommodate clients' needs. Students Finance is working towards establishing electronic filing for full-time applications for financial assistance. The implementation of this process will be phased in.

Electronic Filing

- Electronic filing will improve processing time thereby ensuring students receive their Notices of Assessment in a more timely way. Electronic filing will not be available for the 1996/97 academic year, but our application forms have been revised this year to support the implementation of the new processes required for direct data entry.

***IMPORTANT NOTE Sterling Place Information Services**

- Information services will be available in Edmonton at Sterling Place until **September 30, 1996 only**. Front-line staff will then be relocated to the Edmonton CDC and there will be no public entry or phone service available at Sterling Place. The automated phone service will continue to be available province-wide, 7 days a week and 24 hours a day.

SECTION TWO

SKILLS DEVELOPMENT PROGRAM

- **PRINCIPLES**
- **ROLES & RESPONSIBILITIES**
- **PROGRAM ELIGIBILITY**
- **AUTHORIZED COUNSELLORS**
- **CLIENT ELIGIBILITY**
- **INFORMED CHOICE**



SECTION TWO

THESE ARE THE RESULTS OF THE
ANALYSIS OF THE DATA
OBTAINED FROM THE
EXPERIMENTAL STUDY
CONDUCTED BY THE
RESEARCHER

SKILLS DEVELOPMENT PROGRAM PRINCIPLES

Policy	In recognition of the importance of basic foundation skills, the government of Alberta will provide non-repayable grant support to financially disadvantaged Albertans.
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PROGRAM PRINCIPLES

Need	Students must have a need for this type of training in order to access employment.
Independence Through Employment	Students must intend to seek employment at the conclusion of their studies.
Ready, Willing and Able	Students must have a reasonable chance of succeeding in training and subsequent employment.
Easy Access	Students will have open, streamlined access through 'one stop shopping'
Equity	A 'mainstream' philosophy, common needs assessment criteria and common processes will ensure consistency and fairness for all students.
Informed Choice	Students must demonstrate that they have selected realistic goals and have developed an expedient, appropriate training plan to achieve their goal.
Responsible Students	Students must attend study full-time and take as many courses as they can. Acceptable progress throughout training is required.
Quality Training	Support will be provided for high quality training/education through credible trainers.
Integration	School is not the only and not necessarily the best option for unemployed Albertans. Student assistance for institutionally - based study will be integrated with other department/government initiatives in order to support a variety of responses to the diverse needs of disadvantaged Albertans.

Partnership

The co-operation and involvement of schools/institutions, AFSS, AECD and other stakeholders is essential.

Recognition of Special Needs

Many students require additional services and supports in order to succeed in training.

Adaptable

Support will be adaptable to meet emerging needs of students and to respond to changes in the labour market and in training.

Skills Development Program (SDP) Roles and Responsibilities

Student

- Makes informed choice
- Selects a direct, expedient training plan to achieve employment goal
- Completes application
- Seeks academic counselling, as required
 - Attends school full-time and regularly
 - Makes good academic progress
- Complies with school rules
- Reports changes to personal information to Students Finance (SF)
- Manages personal budget for period provided
- Retains a copy of the Training Plan Summary

Authorized SDP Counsellors

- Screens for appropriateness of training
 - Informed choice counselling
 - Ready and able to commit to studies
 - Other eligibility criteria (e.g. residency, unskilled, etc.)
- Screens returning students if changing programs or schools
- Ensures application is complete
- Prepares Training Plan Summary and retains 1 copy
- Makes appropriate referrals to other programs when clients are ineligible
- Responds to general inquiries about application procedures and processing, and general eligibility criteria
- Coordinates preparation of non-financial appeals to be reviewed by Manager/Supervisor
- Reviews Educational Planning Questionnaire and forwards with application

Career Development Centres May Also:

- Review and recommend Special Circumstances and appeals where appropriate
- Network with schools on a case-by-base basis (e.g. placement problems, counselling for extenuating circumstances, students at risk, etc.)
- Review academic progress
- Act as a resource to schools and delivery partners
- Respond to applicant inquiries

Schools

- Selects (rejects) students referred by delivery partner
- Tests and determines appropriate placement
- Provides core courses linked to training plan
- Completes Section 2 of application
- Confirms registration/enrollment (including wait lists)
- Provides instruction and academic counselling
- Notifies SF of:
 - Changes in full-time status
 - Terminations by school
 - Withdrawals
 - Students who have not met acceptable academic progress requirements
- Distributes (returns) cheque
- Monitors attendance on month-to-month basis
- Consults with the Authorized Counsellor on academic progress issues
- Retains a copy of Training Plan Summary

Students Finance

- Processes applications
- Retains a copy of Training Plan Summary and the Educational Planning Questionnaire
- Notifies students of award
- Makes payments
- Handles funding appeals
- Consults with Authorized Counsellor when there are unusual circumstances surrounding academic progress
- Terminates funding as appropriate
- Audits and employs accountability measures for funding system
- Designates vendors and programs
- Act as a resource to schools and delivery partners
- Responds to requests for emergency funding based on information from delivery partners
- Acts as Secretariat for 2nd level appeals

PROGRAM ELIGIBILITY

TYPES OF TRAINING

Upgrading/Basic Foundation Skills

- These are skills that help students get and keep a job or go on to further training

Upgrading/Basic Foundation Skills Programs

The following are eligible programs:

- Adult Upgrading (Grades 10 - 12)
- Adult Basic Education (Grades 7 - 9)
- Literacy and Numeracy
- English as a Second Language (ESL)
- Pre-Careers Academic Preparation Training
- Pre-Technology Training
- University & College Entrance Preparation (UCEP)

Full-Time Study

- In upgrading at the Grade 10 - 12 level, the student must take at least 3 core courses or subjects (15 credits). Students should take more courses if they are able.
- For other types of training, the program must have minimum of 20 - 25 hours per week of classroom instruction or be approved as a full-time program by Students Finance.

Core Courses

The following are approved core courses:

- English
- Mathematics
- Social Studies
- Sciences (Biology, Chemistry, Physics, Science)
- In addition to these core subjects courses may be selected from other subjects that are pre-requisite to meeting the career goal. These may include subjects such as CALM, Reading, Keyboarding, Computer Literacy, Accounting or a Second Language.

LIFE MANAGEMENT PROGRAMS

As a component of Academic Upgrading

The types of life management programs that are eligible for funding under the SDP are:

- Short term life management programs or courses that train clients in the skills necessary to be successful in full-time academic study (e.g. study skills, reading, CALM, budget and time management).
- Not expected to exceed 8 weeks.
- If this training is required, students will be expected to attend such programs at schools where their academic upgrading will occur.

NOTE: Funding will not be provided for life management programs that have a broader scope or that do not bridge directly to academic upgrading.

Life Management Programs (Employment Preparation Initiatives)

These types of programs are typically designed for more highly barriered individuals who possess low readiness to enter academic training and require a more intensive case management approach and personal support.

One Time Funding Opportunity

- New applicants who are recommended for life management courses will be funded **once** for this type of training.

Short Term Programs

- Welfare recipients planning to attend Basic Foundation Skills programs of two months (9 weeks) or less are referred to Students Finance by an ECSS worker to access the costs of tuition, books and supplies, transportation and child care. Basic living expenses are covered by welfare.
- Other disadvantaged Albertans are referred to Students Finance for funding to cover basic living costs and educational costs for courses of two months or less.

LENGTH OF TRAINING

Students in Upgrading/ Basic Foundation Skills Programs

- By regulation, individuals cannot receive more than four **(4)** academic years of assistance. It is expected that clients can obtain self-sufficiency within this time period.
- Authorized Counsellors should ensure that clients are reminded of this and select the most direct path to achieve their goal.

Students in ESL Programs

- Effective August 1995, Funding of ESL programs through the SDP is limited to **12 months** of full-time training, complemented by an additional year of part-time bursary if required.
- This duration of funding would be permitted regardless of other language training that may have been funded previously by the federal government, other provincial departments or local groups.

NOTE: ESL training is considered as part of the 4 academic years of eligibility for SDP. Students taking the full 12 months for ESL would only have 3 academic years of eligibility remaining for other Basic Foundation Skills Training.

SUMMER SCHOOL

Eligibility Criteria

All students wanting to attend spring or summer Basic Foundation Skills training require written recommendation from an Authorized Counsellor. For students to receive funding to attend spring or summer school, the course(s) must:

- be the final semester of Upgrading/Basic Foundation Skills training
- OR**
- reduce full-time Upgrading/Basic Foundation Skills training by a full semester

OR

- be directly related to the student's occupational goal and is not offered during the regular school year
- Summer courses are not viewed as an alternative to seeking employment.
- Summer programs are very condensed and can be difficult, so students must be adequately prepared for the work load.
- Failure in spring or summer courses will jeopardize further eligibility for Skills Development Program funding: students must demonstrate satisfactory academic progress in spring and summer courses, the same as in regular semesters.

Example of Summer School Eligibility under SDP Funding:

Paul has been enrolled in upgrading for one academic year, under SDP funding. He has applied to NAIT for Computer Engineering, but requires Physics 30; he will complete Physics 20 in June. He wishes to complete Physics 30 in summer school, and is requesting SDP funding. As Paul is making good academic progress and this will be his final semester of upgrading, his Authorized Counsellor has recommended his application for summer school attendance.

AUTHORIZED COUNSELLORS

Authorized Counsellor

Written recommendation is required for all new applicants.

New SDP Applicants Who Are Provincial Welfare Recipients

Contact an Employment and Client Support Services worker located at their local AFSS district office.

SDP Applicants Not Receiving Provincial Welfare

Contact their nearest Career Development Centre

OR

Contact an Alberta Vocational College counsellor if attending an Alberta Vocational College

OR

Contact the Youth Employment Services Centre, if living in Edmonton and under 25 years of age

Applicants Receiving Services from a CASC Site (Canada Alberta Services Centre)

Any applicant receiving services from a CASC site can be authorized for funding by an Authorized Counsellor from a CASC site.

NOTE: Addresses outlined on application form.

Returning Students

If they are:

- Starting Grade 10 level classes, or
- In Adult Basic Education, or
- Going from English as a Second Language (ESL) into upgrading, or
- Changing their job or goal or had problems with their studies

They should: Contact their nearest Career Development Centre

OR

Contact a counsellor at AVC if attending Alberta Vocational College

OR

Contact the Youth Employment Services Centre, if they live in Edmonton and are under 25 years of age

Authorized Counsellors for Persons Who are Short-term Provincial Welfare Recipients

- Some prospective students will need Provincial Welfare or SFI (Supports for Independence) for a period varying from 1 to 4 months for the period just prior to entering school. This sometimes creates some problems in determining who should act as the Authorized Counsellor. The following guidelines may be helpful:
 1. Client receives SFI for the full four months prior to the start of school: ECSS is the Authorized Counsellor.
 2. Client is receiving SFI when applies for school: ECSS is the Authorized Counsellor.
 3. Client is not receiving SFI at time of application but shows some SFI involvement during the four months immediately preceding the start of classes: AVC or CDC counsellors may be the Authorized Counsellor unless the client has during the past 18 months:
 - had frequent SFI involvement
 - OR
 - received SFI funding for more than 12 consecutive months during the past 18 months in which case ECSS may be the Authorized Counsellor. Accountability will reside with the partner who authorized the student.
 4. Client has had no SFI involvement during the four months immediately preceding the start of classes although there is a past history of SFI involvement: AVC or CDC counsellor is the Authorized Counsellor.

New Applicants Receiving Provincial Welfare Through 'Off- Reserve Service Delivery' Agreements

Off-reserve service delivery clients are to contact their nearest AFSS district office requesting approval to attend school, except in the Calgary region where the CDC is performing the Authorized Counsellor role.

'Child In Need' and '17 Year Old Dependents of Provincial Welfare Recipients Turning 18'

Clients in these groups are to be approved for school by an ECSS worker.

CLIENT ELIGIBILITY

General Eligibility Criteria

Need A client must need Basic Foundation Skills in order to access employment. Generally a grade 12 diploma provides entry level qualifications to the labour market.

A client who already has a Grade 12 diploma is not eligible for funding except in rare circumstances. For example, it has been recognized that high school courses or a high school diploma may become obsolete over time. Seven to ten years is the suggested guideline.

Indicators:

- Lack of use of the skills learned
- Changes in school curriculum
- Courses taken in another jurisdiction

Adult Must meet one of the following:

- 18 years or older
- Under 18 and legally married
- OR
- A single parent

Note: Single parents under the age of 18 must explore their funding options through the child welfare system first. If refused by child welfare they may apply to Students Finance through the CDC, AVC or YESC.

SFI Dependents Turning 18

- 17 year old dependents of welfare recipients who are:
 - turning 18
 - in full-time attendance in the regular school system
 - residing with a parent in receipt of welfare

May be referred to Students Finance by an ECSS worker for funding to continue to attend school.

- Referral to be made prior to student's 18th birthday.
- Full time enrollment (15 credits) per semester required for eligibility.
- Course eligibility as per requirements for Grade 12 diploma (see glossary)

NOTE: Program also extends to new welfare recipients who apply for welfare after the dependent's 18th birthday where their dependent is still in the regular school system. The Authorized Counsellor in this instance is the ECSS worker.

- Students who are legally married or common-law (by SF definition) and are under 18 years of age will be funded as a family unit by Students Finance. Funding for the family unit must not be split between Students Finance and Family and Social Services. They must meet all the other eligibility criteria.

Alberta Resident

Client must have resided in Alberta as a non-student for the past 12 months

OR

Must have been an SFI recipient

Out of Public School One Year

Client has been out of the regular school system for at least 12 consecutive months

OR

Has been removed from their parents SFI file because they have reached 18 years of age and are in continual attendance in the regular school system.

OR

Has parents who needed to access SFI following the student's 18th birthday where the student has not been out of school for 12 full months

Unemployed

Indicators:

- Without paid work for 6 of the last 12 months
- Employed less than 25 hours per week

Unskilled

- Work requiring the skills possessed by the applicant is eliminated due to labour market restructuring

OR

- Unable to be actively employed for the last 2 years in their skill area

OR

- Has formal skill training of less than 3 months

OR

- Authorized Counsellor justification and rationale of Labour Market circumstances including reasonable expectations for client mobility

MAINTAINING ELIGIBILITY

1. Attend school Full-Time

Students must be enrolled in at least:

- 15 credits per semester (three (3) core courses/subjects) in academic upgrading at the grade 10 - 12 levels
- 20-25 hours/week for English as a second language
- full-time programs for literacy and adult basic education, as determined by Students Finance.

NOTE: Students who drop one course/subject so that they are no longer attending full-time will have their funding discontinued.

2. Attend Regularly

Regular attendance is required. Absences are permitted in exceptional circumstances only. Student must make school officials aware of any legitimate absences.

3. Make good Academic Progress

- a) In academic upgrading at the high school level, students must be enrolled in a minimum of three (3) core courses/subjects (15 credits) per semester and are required to obtain a pass mark in each.
- b) In ESL and literacy, life management or basic education, students must pass the program/level of study.
- c) Students enrolled in a regular high school program (and have not been out of the school system) must be enrolled in a minimum of 3 high school courses and 15 credits per semester. Students must be pursuing their diploma in an expedient manner and must pass a minimum of 15 credits each semester.

4. Comply with all School Rules

Students must comply with the school's policies and practices for student conduct.

5. Report Changes to Personal Information

While at school students must notify Students Finance if there are any changes to the following:

- name, address or phone number
- academic status
- marital status
- number of dependents
- sources of income, savings or assets/investments

INFORMED CHOICE ELIGIBILITY CRITERIA

Informed Choice

The decision to go back to school is a BIG decision. Students must carefully plan for their return to school, to increase their ability to succeed; it is not something the student should do at the last moment.

Careful planning leads a student to making an "Informed Choice" about returning to school. An individual is considered to have made an "Informed Choice" when they demonstrate that they:

- A) Are **Ready, Willing and Able** to participate and be successful in school
- B) Are **Labour Market Destined** - training is part of an overall plan toward gaining employment
- AND**
- C) Have completed **Career Planning**

As an Authorized Counsellor, you use your expertise to assess a client's readiness, suitability and the level of planning for school they have completed. Your assessment enables you to make your "best judgement" about a client's overall readiness for school. This assessment is critical to the success of clients and the Skills Development Program.

Determining that an individual has made an Informed Choice regarding training involves assessing the following factors/criteria:

- A) **Ready, Willing and Able Means a Client:**
 - has the capacity to be successful in training
 - does not have significant barriers which may preclude success - now is the best time to return to school
 - is motivated to participate in training

Assessing Whether Or Not A Client Is "Ready, Willing and Able"

What is happening in the client's life that "supports" or "jeopardizes" success in training?

Including:

- attitude toward training and goals
- motivation to participate in training/achieve goals
- realistic perception of self and abilities
- current state of client's mental, physical and emotional health:
 - does the client have any medication needs?
 - if so, are there any side effects from required medication which could affect a client's ability to attend and progress in school?
- health: mental, physical or emotional - medication needs/side effects
- health of family/significant others
- motivation to achieve goals and participate in training

- confidence and self-esteem to participate in training
- self-management skills including decision-making, problem - solving ability
- ability to handle stress
- stable relationship(s) with family, friends
- stable home environment including adequate accommodation
- level of support from family and friends
- transportation and day care available if required
- academic capacity to reach goals:
 - learning style is conducive to classroom setting
 - if a learning disability is present, does the client have strategies to compensate for their learning disability?
 - does the client's academic/educational history indicate previous difficulties in school related to academic ability?
 - has or will placement testing be completed?
 - are study skills developed or is the client aware of resources available to develop study skills?
- substance abuse/addictions - self or family / significant others
 - Are there problems with substance abuse (client or family) that will affect client's success in school or their ability to attend school?
- financial situation
 - money management skills developed?
 - does amount of funding available cover basic needs?
 - any outstanding financial obligations (ie. bank loans, high credit card payments, outstanding legal bills)
- upcoming legal actions: court, custody hearings, etc.
- significant pending "transitions" including:
 - pregnancy?
 - relocation to attend school - is client prepared - are move plans in place?
 - pending marriage/separation/divorce?
- patterns of incomplete activities (ie. previous attempts to return to school)

Note: Some situations may warrant recommending a client for training, with the provision that any "readiness issues" be addressed before or during training, ensuring that the client:

- acknowledges issues to be addressed
- is committed to addressing outstanding issues
- is prepared to develop a "plan" to address these issues

Additional Questions Related To Readiness

Ability And Suitability For Training

- is the client aware of their needs and roles as a student?
- is the client aware of the following responsibilities, expectations and consequences of being a student?
 - attendance and academic progress
 - school rules/regulations
 - instructor expectations
- is client aware of the resources and services available to assist them with their success and problems as a student?
- Is this the BEST time for client to pursue studies, or do they need to develop an action plan to address specific readiness issues first?
- is there a back-up plan established?

Example of a Client Who May Not Be Considered “Ready, Willing and Able” to attend Training at this time:

Suzanne arrived in town last week, and is currently staying with friends until she can afford a place of her own. She has less than \$100 to her name and is worried her friends will throw her out when she runs out of money. Suzanne was told she could likely qualify for funding if she wanted to upgrade her grade 10 education. With no current job prospects in sight, she is willing to give school a try. Her main concern currently is the criminal charge she is scheduled to address in court one month after school would begin. While Suzanne is concerned that she may face incarceration, she believes enrolling in school will ‘look good’ to the court, and may help her avoid incarceration.

B) Labour Market Destined

Factors to Explore When Determining a Client to be Labour Market Destined:

- does the client view training as part of an overall plan toward gaining employment?
- does the client demonstrate the life management skills (or a willingness to learn) needed to succeed at work?
- does the client demonstrate a positive attitude toward their potential in the work world?
- is there a clear, definable employment goal established?
- is training the most expedient route to achieving the employment goal?
- is the employment goal realistic based on:
 - client's ability?
 - life situation in relation to family, supports, etc.?
 - health issues?
 - work world?

- is there a plan in place outlining how the client will move from their current situation to the employment goal?
- what is the established time frame from current situation to achieving employment goal?

Example Of A Client Requesting Training But Lacking Labour Market Direction To Justify A Recommendation For Training

Marie works 15 hours per week as a waitress. Her limited employment history consists of short term (2 - 3 months) telemarketing and waitressing positions. With only a grade 10 education, Marie has decided it is a good idea to get her high school diploma, especially since there seems to be grant funding available to help her pay the costs.

Marie says she enjoys waitressing and has not really thought about other career options. Her plan is to obtain a high school diploma, and while upgrading, she will think about other occupational directions in the future.

C) Career Planning

Factors to Explore When Reviewing a Client's Career Plans:

- client can clearly articulate their occupational goals or "path" and what they need to do to achieve these goals
- client demonstrates how they arrived at their chosen goal or path - what decision making process was used?
- what career planning activities has the client engaged in?
 - completed a realistic assessment of skills, interests, abilities, values
 - attended career planning counselling or workshops
- client can demonstrate the relationship between their occupational goals/path and their skills, interests, abilities, values
- client demonstrates that their chosen goal/path is realistic given:
 - labour market conditions
 - client's abilities
 - client's educational/academic background and abilities
 - health factors

- client demonstrates their knowledge of the stated occupational goal gained through solid research including:
 - knowledge of labour market demand
 - knowledge of employment and employer requirements
 - knowledge of working conditions
 - knowledge of training requirements to enter employment in chosen field
 - knowledge of training "options" to achieving requirements
 - knowledge of pre-requisites to enter training
- knowledge of the occupational goal is demonstrated verbally and in writing (a fully completed Educational Planning Questionnaire and any additional documentation such as a career investigation report)
- has client developed a back up plan

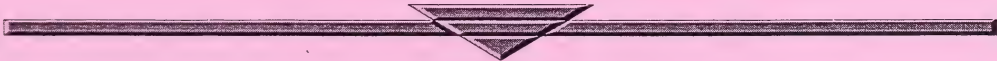
Note: Accountability and the Informed Choice Process

Solid informed choice assessment and counselling is essential for ensuring the success of clients returning to school. Authorized Counsellors are accountable for guiding individuals through the informed choice process, and for recommending training only when satisfied that an individual is ready, willing and able to successfully complete training.

SECTION THREE

PROVISION OF FUNDING

- **GENERAL INFORMATION**
- **MONTHLY BUDGET GUIDELINES**
- **CALCULATING FINANCIAL NEED**
- **PART-TIME FINANCIAL ASSISTANCE**
- **FINANCIAL ASSISTANCE FOR STUDENTS WITH DISABILITIES**
- **ALBERTA STUDENTS AND OTHER GOVERNMENT FUNDING**
- **EMERGENCY FUNDING PROCEDURES**
- **TAXATION OF SKILLS DEVELOPMENT GRANT**



FINANCIAL ASSISTANCE GENERAL INFORMATION

Principles of Student Assistance

- The cost of education is a **shared responsibility** among students, parents, spouses and government
- Assistance is intended to be **supplemental** to student and family resources
- Assistance is awarded based on **financial need**

Assessment of Financial Need

- A student's eligibility is based upon an assessment of educational costs and resources. In determining the award, Students Finance considers the circumstances outlined in the application as well as the average costs and allowances required for the academic period, as identified by Students Finance.

Funding Available

- Students enrolled in Upgrading/Basic Foundation Skills programs may be eligible for Skills Development Grant

Maximums - Skills Development Grant

	<u>Single</u>	<u>Married and Single Parents</u>
One Semester	\$ 4,600	\$ 7,600
Two Semesters	9,200	15,200
Three Semesters	13,800	22,800

NOTE: Clients may not necessarily have their need met with the Skills Development Grant. The above maximums will apply to all individuals in Basic Foundation Skills Programs. In some situations consideration may be given to exceed these maximums (e.g. high medical expenses, large family size). These cases will be reviewed on an individual basis.

FINANCIAL ELIGIBILITY CRITERIA AND DEFINITIONS

Dependent/ Independent

Under the Alberta financial aid programs, students will be classified as dependent and their parents will be required to contribute towards their financial resources **unless**:

- They have been out of high school for 4 (four years)

OR

- They are single and have spent 2 periods of 12 consecutive months available to the labour force (excluding time spent as a full-time student)

OR

- They are married/common-law, divorced or a single parent

RESIDENCY

Single Students

Are considered **dependent** and an Alberta resident:

- If they have been out of high school for less than 4 years and their parents live in Alberta

OR

- If their parents have recently moved out of the province and the student stayed in Alberta to pursue post-secondary study

Are considered **independent** and an Alberta resident:

- If they have been out of high school for 4 years or more

AND

- If they have been living in Alberta for the last 12 consecutive months as a non full-time post-secondary student.

Married/Separated/ Divorced and Single Parent Students

Are considered to be residents:

- If they have spent 12 months in Alberta (excluding time spent as a full-time student). If Alberta is the last province in which they have spent 12 consecutive months.

OR

- If their spouse is an Alberta resident and the student has been present in Canada for 12 consecutive months.

**Clients Referred by
Alberta
Family and Social
Services**

- May be considered Alberta residents

**Special Residency
Situations**

Special residency consideration may be given to:

- Residents in border communities
- Newcomers to Canada taking ESL training who are not eligible for other forms of student assistance or have exhausted other sources (i.e., LINC funding)

COMMON-LAW

A client is considered common-law if.

- They have lived together for 1 year or more
OR
- They live together and have children living in the household
OR
- They are receiving Provincial Welfare and an Authorized Counsellor has approved the use of the Family and Social Services definition for common-law.

NOTE: Common-law relationships will be considered the same as married students. Children in the household needn't be from the current relationship.

CITIZENSHIP

A client must be one of the following:

- A Canadian citizen
- A Landed Immigrant
- A refugee as defined in the Canadian Immigration Act
- A Convention Refugee

NOTE: Visa students are not eligible

ADULT

A client must meet one of the following criteria:

- Be 18 years or older
- Be under 18 years and legally married, common-law or a single parent

NOTE: Single parents 15 years of age and under must be referred to Child Welfare

OUT OF PUBLIC SCHOOL FOR ONE YEAR

A client must have been out of the regular school system for **one** calendar year.

NOTE: Exceptions are as follows:

- Family and Social Services dependent turning 18
- Student who is not safe living in the current home environment (student at risk)
- **Children of financially destitute (non SFI) parents who have not been out of the regular school system for one year are not eligible.**

MONTHLY LIVING COSTS

The monthly livings costs allowed for students in Upgrading/Basic Foundation Skills programs will be as follows:

Status

Living Costs Per Month (Max)

Single student at home	\$315*
Single student away from home	\$625
Single parent with one child	\$1,090** + child care
Married couple - no children	\$1,100** + child care
- one child	\$1,410** + child care
- two children	\$1,630** + child care

Please note:

* Single students out of high school less than 4 years whose parents reside within commuting distance of the school are expected to live in their parents' home.

** Subsidized rents may reduce this amount

For larger families, maximum shelter allowances will be in place based on rental rates for 3 bedroom units.

Monthly Budget Guidelines-Detail

Single Student Living in Parents' Home Budget

1996/1997

Food and Personal Care	\$180
Clothing and Personal Allowance	95
Local Transportation	<u>40</u>
TOTAL	\$315 (Max)

NOTE: *Single dependent students whose parents reside within commuting distance of the school are expected to live in their parents' home.*

Single Student Away From Home Budget

1996/1997

Shelter	\$280
Food and Personal Care	225
Clothing and Personal Allowance	80
Local Transportation	<u>40</u>
TOTAL	\$625 (Max)

NOTE: *The rental component of the budget is based on shared accommodation.*

Married - No children**1996/1997**

Food and Personal Care	\$430
Clothing, Personal Allowance & Household Expenses	130
Local Transportation	<u>80</u>
SUBTOTAL	\$640
 Rent and Utilities (Allow actual to)	 <u>460</u> (Max)
 TOTAL	 \$1,100

NOTE: Additional costs are recognized as the size of the family unit increases to a maximum of:

- For the first and third child, add \$310
- For all additional children add \$220 per child
- Daycare/baby-sitting: \$75/month/child will be used or actual daycare costs if receipts are submitted. Students are expected to use subsidized daycare in urban centers and where possible in rural areas.
- Maximum shelter allowances will be in place based on rental rates for 3 bedroom units.

Single Parent - One Child**1996/1997**

Food and Personal Care	\$350
Clothing, Personal Allowance & Household Expenses	120
Local Transportation	<u>60</u>
SUBTOTAL	\$530
 Rent and Utilities	 <u>560</u> (Max)
 TOTAL	 \$1,090

NOTE: Additional costs are recognized as the size of the family unit increases

- For the third child, add \$310
- For all additional children add \$220 per child
- Daycare/babysitting: \$75/month/child will be used or actual daycare costs if receipts are submitted. Students are expected to use subsidized daycare in urban centers and where possible in rural areas.
- Maximum shelter allowances will be in place based on rental rates for 3 bedroom units.

CALCULATING FINANCIAL NEED

Assessment of Financial Need

- The amount of funding provided is based on an assessment of the student's school and living costs and resources. Students Finance considers the student's circumstances shown on the funding application as well as the average living costs needed for a school year. The money given is intended to supplement, not replace, resources available from students, parents, spouses and other sources.

$Financial\ Need = Allowable\ Costs - Resources$
--

Allowable Costs

These include the following:

- Tuition and mandatory fees
- Books, supplies and instruments
- Shelter costs: rent/mortgage
- Utilities
- Transportation
- Food/clothing/personal care
- Medical costs not covered by insurance
- Child care (if required)

Resources

These include the following:

Expected student contribution

It is expected that students contribute towards the costs of their own education. The expected contribution required:

- with 2 months between periods of study = \$720
- with 3 months between periods of study = \$1080
- with 4 months between periods of study = \$1350

NOTE: This contribution can be met through a combination of savings and part-time earnings while attending school.

Exceptions to minimum contributions are

Single students receiving welfare = \$720
Married students receiving welfare = amount actually saved
Single parents = amount actually saved
SFI dependent turning 18, continuing in high school = amount actually saved

IMPORTANT NOTE:
Periods of Non-Enrollment

- the Skills Development Program is designed to move students toward full-time employment: summer employment is a positive step in this process
- when not in school, "students" are expected to seek employment
- students are expected to participate in an active job search prior to the end of school
- local strategies and services exist to assist students with their job search and include:
 - job search services at local Human Resources Centres of Canada and Youth Employment Services Centre (ages 15-24 in Edmonton)
 - Hire A Student services in many communities
 - Human Resources Development Canada (Auto-jics)
 - Summer Employment Programs: Summer Temporary Employment Program (STEP); Federal Summer Student Employment Program (FSSEP)
 - School placement offices and job boards
 - Job Hotlines
 - Temporary Employment Agencies
- it is expected that students will not need to seek SFI during periods of non-enrollment
- students seeking SFI during periods of non-enrollment will be required to:
 - develop an employment plan;
 - demonstrate an active search for employment;
 - confirm that they have applied for Students Finance funding for the following semester of study if they are planning to return to school

Note: Expectations for periods of non-enrollment should be discussed with students at the time of their initial contact with an Authorized Counsellor, to form part of an individual's informed decision.

Money from parents

- If student's parents are providing money while they are attending school the monthly amount should be entered

Part-Time earnings

- Students earnings after deductions should be entered
- Deductions include: Canada Pension Plan (CPP), Employment Insurance (EI), and Income Tax

Spousal contribution

- Spouses are expected to contribute towards the cost of the student's education
- The minimum expected contribution is \$550 per month. This amount will be used by Students Finance in instances where a spouse is expected to work but is not currently employed.
- Spousal earnings after deductions should be entered
- Justifiable reasons that spouses may not be expected to contribute:
 - spouse is at home with children aged 23 months or younger
 - has a documented inability to find work
 - has documented medical reason(s)
 - spouse is also a full-time student

NOTE: Authorized SDP Counsellors can recommend spousal contribution be waived due to special circumstances

Expected parental contribution

- Is required from parents of single students who have been out of high school less than four years
- If more than one student in the family is attending a post-secondary institution, parental contribution is divided by the number attending
- Please refer to the table below:

Number of Persons in Family	<u>Parents 1995 Total Income as Reported on</u> <u>Line 150 of their Income Tax Returns</u> <u>Less UIC, CPP and Income Tax</u> (Based on a 34 week program)					
	\$30,000	\$34,000	\$38,000	\$42,000	\$46,000	\$50,000
3	0	765	2,354	4,315	6,277	8,238
4	0	0	677	2,206	4,168	6,130
5	0	0	0	735	2,305	4,266
6	0	0	0	0	961	2,648
7	0	0	0	0	118	1,432
8	0	0	0	0	0	618
9	0	0	0	0	0	88
10	0	0	0	0	0	0

Other government funding

- Students should include any government funding they will be receiving while attending school (eg. VRDP, Worker's Compensation benefits, AISH, Indian and Northern Affairs etc.)
- Students who are receiving Employment Insurance, or are eligible to receive it, should check with the Human Resource Centre of Canada to confirm if they will continue to receive EI while they are a full-time student.

NOTE: If the student or their spouse is receiving SFI/Welfare, these benefits will not continue while they are in school. This amount should not be included as income.

Registered Retirement Savings Plans (RRSP's)

- Students should enter the full value of all RRSP'S

Assets

- This would include full value of stocks, bonds and term deposits

Child Support/Alimony

- Students should enter the full amount if they are receiving either alimony or child support. They should add the amounts together if they are receiving both
- Welfare recipients who have had child support subrogated while receiving welfare, will indicate the amount being paid to the Maintenance Enforcement Program.

NOTE: Students are expected to register with the Maintenance Enforcement Program if they are not receiving child support

Vehicles

- All students must list the vehicles that they own or use regularly
- Married students must also list their spouse's vehicles
- Value of the vehicle greater than \$5000 is used as a resource in the calculation of the student's eligibility
- This includes leased vehicles

Other income

- Students should include other income (e.g. orphan's benefits, pensions, rental property, business) that they, or their spouse, will be receiving while attending school

EXAMPLES OF ASSESSMENT CALCULATIONS

Examples 1 & 1A

A single student out of school 4 years is studying at the grade 10 level from September to June and is not living with his/her parents. Example 1A (Same student but is attending only one semester).

Need Assessment Calculation

Total income = Welfare Recipient
Expected contribution = \$ 720

Student's Educational Costs

	<u>Example 1</u>		<u>Example 1A</u>
Tuition	\$ 800		\$ 400
Books and supplies	\$ 200		\$ 100
Away from home living allowance (\$625 x 10 months)	\$ 6,250	(\$625 x 5 mon.)	\$ 3,125
Total Expenses	\$ 7,250		\$ 3,625

Resources

Expected Contribution	\$ 720	\$ 720
Total Resources	\$ 720	\$ 720

Total Educational costs	\$ 7,050	\$3,525
Resources	- \$ 720	\$ 720

Eligibility

\$ 6,530 **\$ 2,905**

Disbursements

	<u>Example 1</u>	<u>Example 1A</u>
1st Semester		
September	\$ 653*	\$ 581*
October	\$ 553	\$ 481
November	\$ 553	\$ 481
December	\$ 553	\$ 481
January	\$ 553	\$ 481
		\$ 2,505

*(includes \$100 books & supplies)

2nd semester

February	\$ 653*
March	\$ 553
April	\$ 553
May	\$ 553
June	\$ 553
Total	\$ 5,730

Example 1

*The amount to purchase books is \$200 or greater. Therefore it is split in two and added to the first disbursement of each semester.

Additional Costs

Tuition of \$800 is paid directly to the school on the student's behalf (Example 1).

Tuition of \$400 is paid directly to the school on the student's behalf (Example 1A)

Examples 2 & 2A

Common-law student studying at grade 9 level (8 month program). The spouse stays home with children 23 months and 4 months old. Example 2A (Same student but is attending only one semester)

Need Assessment Calculation

Total family income = Welfare Recipient
Expected contribution = Amount actually saved

Student's Educational Costs

	<u>Example 2</u>	<u>Example 2A</u>
Tuition	\$ 800	\$ 400
Books and supplies	\$ 300	\$ 150
Living costs (\$1,630 x 8 months)	\$ 13,040	\$ 6,520
Medical (\$50/mo-spouse has Asthma)	\$ 400	\$ 200
Total Expenses	\$ 14,540	\$ 7,270

Resources

Spousal Contribution	\$ 0	\$ 0
Actual savings	\$ 0	\$ 0
Actual part-time earnings (\$300/month X 8 months)	\$ 2,400*	\$ 1,200*
Total Resources	\$ 800	\$ 400

*((\$200/month earnings exemption)

Calculation

Expenses	\$ 14,540	\$ 7,270
Resources	<u>-\$ 800</u>	<u>\$ 400</u>

Eligibility

\$ 13,740 **\$ 6,870**

Disbursements

1st Semester		
September	\$ 1,730*	\$ 1,730*
October	\$ 1,580	\$ 1,580
November	\$ 1,580	\$ 1,580
December	\$ 1,580	<u>\$ 1,580</u>
		\$ 6,470

*(includes \$150 books & supplies)

2nd Semester

January	\$ 1,730**
February	\$ 1,580
March	\$ 1,580
April	\$ 1,580
Total	\$ 12,940

**The amount to purchase books is greater than \$200. This amount will be split in two and added to the first disbursement of each semester.

Additional Costs

Tuition of \$800 is paid directly to the school on the student's behalf (Example 2)

Tuition of \$400 is paid directly to the school on the student's behalf (Example 2A)

PART-TIME STUDY OPTIONS NEW FOR 1996/97

Redesign of Part-Time Study Options

- A redesign of the Part-Time study options has occurred. A recent program evaluation identified a need for broader access to part-time study at the basic foundation skills (BFS) level to complement the full-time Skills Development (SDP) Program.
- Also the federal government introduced a grant for high need, part-time post-secondary students, creating a new financial alternative for these students.

Interim Process

- An interim process is being finalized for the upcoming year. The suggestion is there will be four streams-two for post-secondary and two for basic foundation skills applicants.

Financial Need

- All students must demonstrate financial need before they can qualify for funding.

One Application Form

- One application form for all streams is currently being designed.

Implementation Date

- Full implementation is planned for start dates of August 1, 1996 or later.
- For start dates prior to August 1, 1996 clients may apply on 1995/96 Part-Time Bursary application forms and if they receive a recommendation from their Authorized Counsellor they may be awarded grants of up to \$600 per semester.

NOTE: More details on how and when to use the Part-Time options will be provided when the application becomes available.

FINANCIAL ASSISTANCE FOR STUDENT WITH DISABILITIES

LINKS BETWEEN SKILLS DEVELOPMENT PROGRAM AND VOCATIONAL REHABILITATION FOR DISABLED PERSONS (VRDP)

Existing VRDP Clients

- Effective Spring 1995, all existing VRDP clients will continue to be supported based on existing agreements until they complete their **currently approved program** (programs approved prior to Spring 1995). Commitments to students to provide support will be fulfilled as long as they demonstrate progress toward their vocational goals, and there are available funds.

New Students In Upgrading/Basic Foundation Skills Programs

- New students applying for financial assistance after Spring 1995 to attend Upgrading/Basic Foundation Skills programs apply for Skills Development Program funding to cover generic learning related costs (tuition, books, living costs, etc.). Any required Disability Related Supports (DRS) may be provided through the VRDP program, and would require completion of a VRDP application, in consultation with a counsellor at a local Career Development Centre.

Students Enrolled In Transitional Vocational Programs

- Students enrolling or planning to enroll in a Transitional Vocational Program (TVP) should be in contact with a counsellor at their local Career Development Centre to explore their eligibility for VRDP funding, as this program is not eligible for Skills Development Program nor post-secondary loan funding.

ALBERTA STUDENTS AND OTHER GOVERNMENT FUNDING

Bridging for SFI Clients

- Welfare recipients who are recommended by an ECSS worker to take Upgrading/Basic Foundation Skills have their welfare benefits continued until Students Finance funding is confirmed via the tape match.
- Welfare **applicants** who are in attendance in a post-secondary institution are not eligible for welfare funds.
- Welfare recipients who are non-compliant and who are planning to attend **Basic Foundation Skills** programming are not treated any differently than other welfare recipients. This means that prospective students who have not followed through on their employment plans may have welfare benefits terminated even though Students Finance funds are not yet in place.
- Welfare recipients applying to or in **University, University Transfer or Skill Training Programs in excess of two years** are not eligible for welfare funds once school is in session.

Alberta Students and the Alberta Child Care Subsidy Program

The Alberta Child Care Subsidy Program:

- Helps eligible families who may not be able to afford child care
- Provides subsidies for eligible families with children in licensed day care centers or approved family day homes
- Is run by Alberta Family and Social Services
- Is not available for parents who use drop-in day care services, nursery schools, play schools, parents' programs or private baby sitting arrangements
- A parent who is a student must:
 - be a parent attending school or a training program
 - have a net family income below provincial subsidy guidelines
 - have a child that will attend the day care or approved family day home for more than 50 hours a month

Process:

- Parent can obtain a subsidy for the initial month of school based on the current family income
- Once Students Finance funding is in place the subsidy is reassessed based on the amount awarded by Students Finance minus the costs of tuition, books and supplies
- Applications for child care subsidy are available at all licensed day care centers and approved family day homes as well as regional subsidy offices.

Further Information

Information on child care subsidies is available at regional subsidy offices.

Child Support and Students Finance

- Skills Development Program is a program of last resort.
- A responsibility of a recipient of the Skills Development Grant is to access money available from other sources. Child support is one of these sources.
- Maintenance Enforcement Program (MEP) is a program administered by Alberta Justice. It has the ability to enforce maintenance orders and some agreements. MEP will ensure that child support payments are collected from the other parent.
- For those students who were receiving provincial welfare prior to going to school, their child support payments may have been going directly to the government (subrogated). Once a person is no longer receiving welfare benefits any child support paid will go directly to the custodial parent.

- Custodial parents who have not been receiving regular payments for child support should average the amount received during the past year and enter this as a resource in the Application for Financial Assistance for Full-time Study in Upgrading/Basic Foundation Skills. If the money has been subrogated, the prospective student should call MEP to get the details of the previous year's payments.
- If child support payments are not received, the student can appeal for additional funds.

Medical Insurance Coverage for Students Accessing Students Finance

- Medical premiums and insurance coverage(s) are the responsibility of each individual student. There is no group plan under Students Finance.
- Alberta residents have coverage under the Alberta Health Care Insurance Plan (AHCIP). For welfare recipients, premiums have been covered while in receipt of welfare. Other Albertans may have been responsible for their own premium payments.
- Premium subsidies for AHCIP are available for low income Albertans. People must apply for the subsidy each year. The subsidy benefit year runs from July 1 to June 30. (See Appendix for application).
- Alberta Blue Cross provides hospital and additional health benefits (prescription drug, ambulance, prosthetic and orthodontic, mastectomy, accidental dental, clinical psychology and home nursing care). Application for Blue Cross must be made within 30 days of leaving another health plan (including welfare) or there is a three month non-insured period even though premium payment is required during this time. Blue Cross coverage will be billed quarterly by Alberta Health (See Appendix for application).
- Blue Cross coverage is not available if the applicant's Alberta Health Care Insurance premiums are in arrears. It is possible for people to apply for premium subsidy for AHCIP for the current benefit year and for **two previous** benefit years. The applicant needs to complete an Application for Retroactive Premium Subsidy.
- Premium subsidies for Blue Cross are available automatically for those people who are eligible for AHCIP subsidy.
- Application forms are available at Alberta Health. Inquiries should be made at Alberta Health 427-1522. Send applications to Alberta Health at P.O. Box 1360, Edmonton, Alberta, T5J 2N3. **Do not** send to Students Finance.

EMERGENCY FUNDING PROCEDURES

Is it an Emergency?

- Assess the extent of the emergency. Are there other resources that students can access while waiting for regular processing of the application/appeal? **Please ensure that emergencies are truly emergencies!**

Definition of an Emergency Situation:

- Circumstances are beyond the student's control
- The student has **no** resources to resolve the situation **and**
- There is a risk to health and safety

NOTE: Do **not** refer the student to Alberta Family and Social Services. Welfare is not available to students. Students should be referred to other resources for immediate assistance while emergency funding is being prepared.

Examples of resources that are available:

- If the student has no safe accommodation (i.e., fleeing an abusive situation) they can be referred to a shelter such as WIN House, a Safe Place etc.
- If the student has no accommodation due to a disaster such as a fire they can be referred to their landlord. The landlord may have a legal obligation to find alternative shelter for the client. If the client has insurance they may be eligible for assistance with housing. Emergency Relief Services may also be able to provide some assistance.
- If the student has a medical/dental emergency they can be referred to a hospital.

Is Other Funding Available?

In all cases the following issues must first be reviewed:

- Investigate when the next resource/funding is available to the student (i.e., child support payment, child tax credit payment, any other source of income).
- Can family members or friends assist the student?
- Can alternate arrangements be made to cover the emergency costs (i.e., can partial or delayed payment be negotiated)?

Interim Emergency Procedures

- Due to the organizational changes, actual emergency procedures are still being determined. All delivery partners will be advised of these procedures once they are established.

TAXATION OF SKILLS DEVELOPMENT GRANT FUNDING

Grant money that students receive from Students Finance for Upgrading/Basic Foundation Skills programs may be considered taxable. Students who:

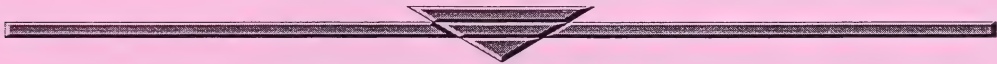
- received provincial welfare before getting grant money from Students Finance will be issued a T5007 information slip. This is considered to be a Social Allowance benefit and **is not taxable**.
- were **NOT** receiving provincial welfare before getting this grant money will be issued a T4A information slip. This income **is considered to be taxable** and students may be required to pay income tax.

NOTE: If students have questions about this they can call Revenue Canada's Taxation inquiry line at 423-3510.

SECTION FOUR

COMPLETING THE FORMS

- **SUPPORTING DOCUMENTATION**
- **SPECIAL CIRCUMSTANCES AND EXPENSES FORM**
- **EDUCATIONAL PLANNING QUESTIONNAIRE**
- **TRAINING PLAN SUMMARY**
- **SECTION 2 OF THE UPGRADING/BASIC FOUNDATION SKILLS APPLICATION**



SUPPORTING DOCUMENTATION AND SPECIAL CIRCUMSTANCES AND EXPENSES FORM

SUPPORTING DOCUMENTATION

Students

- As we move towards electronic filing, students will no longer be asked to supply all their supporting documentation with their application. This is to alleviate the back and forth mailing that occurs between Students Finance and the student.
- Generally applications will be processed using the information provided. However, students **will be audited** afterwards and will be required to produce the documents to support their applications.

Authorized Counsellors

- Authorized Counsellors will review documents when discussing a student's situation to determine eligibility. In offices where student files are kept, documentation can be kept there. In other offices, counsellors must tell students to keep these documents for the audit.

NOTE: When discussing a student's budget, counsellors may ask to see supporting documents, but again that documentation shouldn't be attached to the application. There may be times when Authorized Counsellors choose to attach documents to a student's application. Please exercise **caution** when choosing to attach documents to a student's application. These applications will be forwarded to the Review Unit at Students Finance which involves **special handling**. The remainder of the applications will be processed through the new direct data entry system.

SPECIAL CIRCUMSTANCES EXPENSES FORM

CDC Authorized Counsellors

- Authorization to increase awards to recognize special expenses/circumstances for upgrading and post-secondary students has been delegated to CDC Authorized Counsellors and Area Managers.
- This Special Circumstances form should accompany the original application to avoid further appeals.
- Implementation of appropriate accountability mechanisms are an integral component of this delegation.

ECSS or AVC Counsellors

- Any ECSS or AVC counsellors who encounter students with special needs or circumstances should outline these needs by attaching a letter to the original application. These applications are to be sent directly to Students Finance where they will be processed by the Review Unit.

EDUCATIONAL PLANNING QUESTIONNAIRE (EPQ)

Effective May 1, 1996, the Educational Planning Questionnaire must now be sent in to Students Finance, as part of a student's application package.

Information contained in the Educational Planning questionnaire, particularly in Section A, will be used for research and program evaluation purposes.

Intent

The Educational Planning Questionnaire is a tool designed to help individuals plan their return to school carefully. It is also a means for individuals to demonstrate the level of planning and preparation they have completed prior to requesting training. (See Appendix)

The employment and educational information provided in Section A of the Educational Planning Questionnaire can also assist the Authorized Counsellor in determining an individual's eligibility.

Which individuals are Required to Complete the Educational Planning Questionnaire?

The Educational Planning Questionnaire must be completed, and an individual must receive an Authorized Counsellor's recommendation for training if they:

- are applying for Skills Development Program funding for the first time
OR
- are returning to school after a break in study of 6 months or more
OR
- are starting Grade 10 level classes
OR
- are in Adult Basic Education-a yearly recommendation is required
OR
- are going from ESL into upgrading
OR
- changed job goal or had problems with their studies

Note: It is also recommended that individuals who **change schools** between semesters or years of Basic Foundation Skills training consult their Authorized Counsellor for a recommendation for ongoing study. Changes in school can affect an individual's over all training plan, and in some cases can signal difficulty with academic progress.

Authorized Counsellors' Roles

It is critical that **ALL** Authorized Counsellors ensure that students have fully completed the Educational Planning Questionnaire. Many Authorized Counsellors request that individuals complete supplementary information, including in-depth career investigation reports and academic planners. This practice is encouraged among Authorized Counsellors, but these documents are **IN ADDITION TO**, not in place of, the Educational Planning Questionnaire. Supplementary documents such as career investigation reports are not to accompany an individual's application to Students Finance, but should be retained on the Authorized Counsellor's file (if applicable). If an Authorized Counsellor wishes the supplementary document to form part of the Educational Planning questionnaire, it must be stapled directly to this form, to avoid being confused as separate documentation, which would then cause the application form to be sent to the Eligibility Review Unit.

New Fields

- A few new fields have been added. These include:
 - 1) Country in which training took place
 - 2) Employment hours per week and hourly wage
 - 3) Employment Insurance (EI) benefits
- These new fields will provide pre-SDP data concerning education and employment and will be used to determine program outcomes

Section A

- The following is a quick reference regarding new questions or additions to questions in the "Background and Present Information" (Section A) of the **Educational Planning Questionnaire (EPQ)**.

A.1

- List the names of all schools that are applicable. In addition, indicate the country in which this training took place, e.g., Canada, China, Iran, India, etc. Include the highest grade/level completed together with the last date attended and whether a diploma/degree/certificate was obtained.

A.2

- If the response is "Yes", provide the name of the sponsoring agency (e.g., Family and Social Services, Catholic Social Services) and the start and end dates.

A.3

- Please be specific when completing this section. If a client mentions that they worked in retail, ask for details on roles and responsibilities. Were they a cashier, store security, manager?
- Also indicate the number of hours worked per week and whether they were in full-time or part-time employment (total hours should be used where applicable).

TRAINING PLAN SUMMARY (TPS)

Purpose of The Document

- Recognized need for a signed document to inform the educational institutions that the client was approved for school. The form:
 - Directs schools to schedule the student utilizing the most expedient route to reach the career goal **and**
 - Ensures that the student enrolls in a minimum of three core courses per semester
- 1. Authorized Counsellors determine the eligibility of the prospective student including need for school, general eligibility, ready, willing and able and informed choice.
- 2. Career counsellors and schools determine the courses and levels of courses needed to reach the career goal. (See Appendix)

Application Process Section 1

- Authorized Counsellor completes the name of student, and the SIN.
- **Part A** is only for ECSS counsellors who have dependents of SFI recipients who are turning 18 or have new SFI recipients with dependents 18 or over who are still in the regular school system. These dependents have to be making satisfactory progress and cannot have been out of the school system for greater than one year. The courses for these students reflect a 'first chance system' in the regular school stream. This program allows dependents to complete their high school program with funding in place. Funding under SF commences the month following the dependent's 18th birthday.
- **Part B** is for adults accessing the SDP program. The Authorized Counsellor specifies the name of the school and the level of schooling for which approval is given. **Note:** The educational institutions are instructed to refer students back to the Authorized Counsellor if they test at a different level than that for which approval is given. Authorized Counsellors must complete for all students the results of the career study undertaken and the career goal or path that is approved.
- **Students at the literacy, ABE or ESL do not have section 2 of Part B completed.**

Section 2

- Instructions to the school are emphasized
 1. Courses must be selected so that students are proceeding by the most expedient route.
 2. Students must be enrolled in three core courses each semester.
- If training beyond the secondary level is the career goal of the student the Authorized Counsellor must indicate the school and the program name where the student intends to pursue this training.

- Course selection can be done by the schools and the counsellors at the CDCs. ECSS workers may also select courses in situations where the path is evident. Course stream (eg. 10/20/30 or 13/23/33) may be identified if the counsellor is able to make that selection.

Section 3

- This section provides the opportunity for Authorized Counsellors to place any limitations or qualifications on the approval. (ie. Approval could be given for prep week only or for one semester only with review). Since another Authorized Counsellor may have to contact you at a later date to discuss the student and the progress, it is important that the counsellor include the name of the agency and phone and fax numbers.

Section 4

- This section allows the Authorized Counsellor another opportunity to re-enforce the principles of the Skills Development Program with the student. It also places responsibility for adherence to the plan on the student.

Copies of the Training Plan

- Each partner in the program retains a copy of the training plan. One goes to the student, one to the school, one to the Authorized Counsellor and one to Students Finance. The student must be encouraged to deliver the appropriate copy to the school.

SECTION 2 OF THE UPGRADING/BASIC FOUNDATION SKILLS APPLICATION FOR FULL-TIME STUDY 1996/97

SECTION 2 - SCHOOL INFORMATION

This part of the application has been revised and it is important schools complete this section accurately (See Appendix). The program names and numbers indicated on the Program Code List are the only ones to be used.

If the program code is not listed, the school should contact the Field Support Unit at Students Finance at 427-7151.

Other numbers e.g. federal numbers or individualized school/program codes should not be used. This section of the application needs to be completed in its entirety.

Line 19/20 - School Code/Campus Code

Schools should enter the name of the school the student is planning to attend and in line 19 enter the corresponding school code. If a student is attending the main campus of the school nothing needs to be entered in line 20. If a student is attending another campus the school enters the correct code provided on the code sheet.

If the student is attending a campus not listed on the Institution Code List the school should contact the Field Support Unit at 427-7151.

Line 23 - Training Dates

These are the start and end dates of the academic session. Students may apply for a maximum of two terms or semesters on one application.

Line 24 - Student ID

Schools should enter the student's ID number **issued by the school**. The Alberta Education number should not be used.

NOTE: This number is essential for tuition payment purposes.

PROGRAM INFORMATION

Line 28 and 29 - Name of Program

Schools must print the name of the program of study from the Program Code List in line 28 for semester 1 and line 29 for semester 2. Schools also must indicate the program level number from the Program Code List provided.

Tuition, Mandatory Fees, Student Association Fees and Book/Supply Costs

All Tuition and/or Mandatory fees, Student Association Fees, and Book/Supply Costs should be itemized in line 28 and line 29. **It is important that schools fully and accurately complete this section of the application.** Book Rental Fees must be included under Book/Supply Costs. It will be the school's responsibility to collect this fee from the students. If the student is attending 2 semesters, list costs for each semester on lines 28 and 29..

The last box in lines 28 and 29 asks about the number of months in a term. **This applies to ESL students only.** It is to be left blank if the student is enrolled in any other program.

NOTE: All costs must be rounded (up) to the nearest dollar amount and must not exceed the maximums.

Number of Courses

A student must be enrolled in a minimum of 3 courses per term at the grade 10 - 12 level in order to be considered a full-time student. One course at this level is defined as a five credit course. Other types of training are approved as full-time programs by the department and will be given consideration as follows:

- a minimum of **25 hours** per week of classroom training will be considered the equivalent of **four courses**
- classroom training of less than 25 hours, but not less than **20 hours** will be considered the equivalent of **three courses**.

If students are enrolled in credit hours, the school should convert the hours to course numbers based on the above two points. The maximum number of courses a student can take is 5 courses per term. For full year courses, the school should count the number of courses in both semesters.

Payment of Fees

Tuition, Mandatory Fees and Student Association Fees are normally paid directly to the school. **However, if the total Tuition, Mandatory Fees and Student Association Fees are less than or equal to \$350/term this amount will be paid to the student.** It will be the school's responsibility to collect these fees from the students. This payment will be paid to the student on the first cheque of each term.

Line 30/31 Acceptable Academic Progress

Line 30 and line 31 must be answered.

Line 32 - Signature of School

The signature, printed name, title, date and telephone number of the appropriate school official must appear in line 32. A school stamp is not essential in this area. If schools are choosing to use a school stamp they must be sure not to stamp over top of line 28 and 29.

Students in program combinations

If students are enrolled in a combination of courses from different program levels over the entire academic year the school should use the lower program level number.

COURSE COMBINATIONS OVER ENTIRE ACADEMIC YEAR	APPROPRIATE PROGRAM CODE
3 Academic upgrading courses and 3 Adult Basic Education	702
Grade 10 courses, grade 11 courses, and grade 12 courses simultaneously and in final year of upgrading	either 711 in term 1 and 712 in term 2 OR 712 all year
Grade 10 courses, grade 11 courses and grade 12 courses simultaneously and not in final year of upgrading	710 indicates student has more than one year of upgrading remaining 711 indicates student has one year of upgrading remaining
High school ESL	710 or 711 or 712
ESL/Upgrading combination	720
NOTE: UCEP is a unique program offered at some schools. This program code can not be interchanged with regular academic upgrading even if students are preparing to continue study at the College or University level.	

Other Information

All new students and those returning students beginning a new path of studies (e.g. starting Grade 10 level classes, in ABE level training, moving from ESL into upgrading, etc.) require a written recommendation from an Authorized Counsellor before their funding application can be processed. Some students who require a written recommendation may contact a school before seeing an Authorized Counsellor. As these individuals may or may not be eligible for funding, the school should refer them to their Authorized Counsellor to go through the Informed Choice process.

TIP: Students recommended for funding will have a "Training Plan Summary" form signed by the Authorized Counsellor. Some clients will also have their Counsellor's recommendation noted in Section 7 of the funding application.

If the school is unable to provide the approved courses noted on the student's Training Plan Summary the following should be noted:

1. The school official line should not be signed. Note in the Comments section that the student's Training Plan requirements could not be met and provide a brief explanation.
2. Call the student's Authorized Counsellor to discuss alternatives
3. Ask the student to return to their Authorized Counsellor to explore other options.

SECTION FIVE

APPEALS

- **FINANCIAL APPEALS**
- **INFORMED CHOICE APPEALS**



FINANCIAL APPEALS

1996/97 CHANGES TO FINANCIAL APPEAL PROCEDURE

4 Entry Points

- With the reorganization, the appeal procedure has been redesigned as well. Students now have 4 entry points into the appeal process. The process is summarized on the flow chart in this section.

A written explanation of the procedure follows:

Calgary Students

- For those students who live in Calgary, they may deliver their appeal applications to the Students Finance/CDC office.
- At that particular office, clients' applications will be verified for completeness, recommendations made and the assessment information be entered into the computer.

School Awards Officers

- If students choose to go to their School Awards Officer (many post-secondary students do) the Awards Officer will verify the application for completeness, forward the application to Sterling Place where a review and recommendation will be made and the appeal processed.

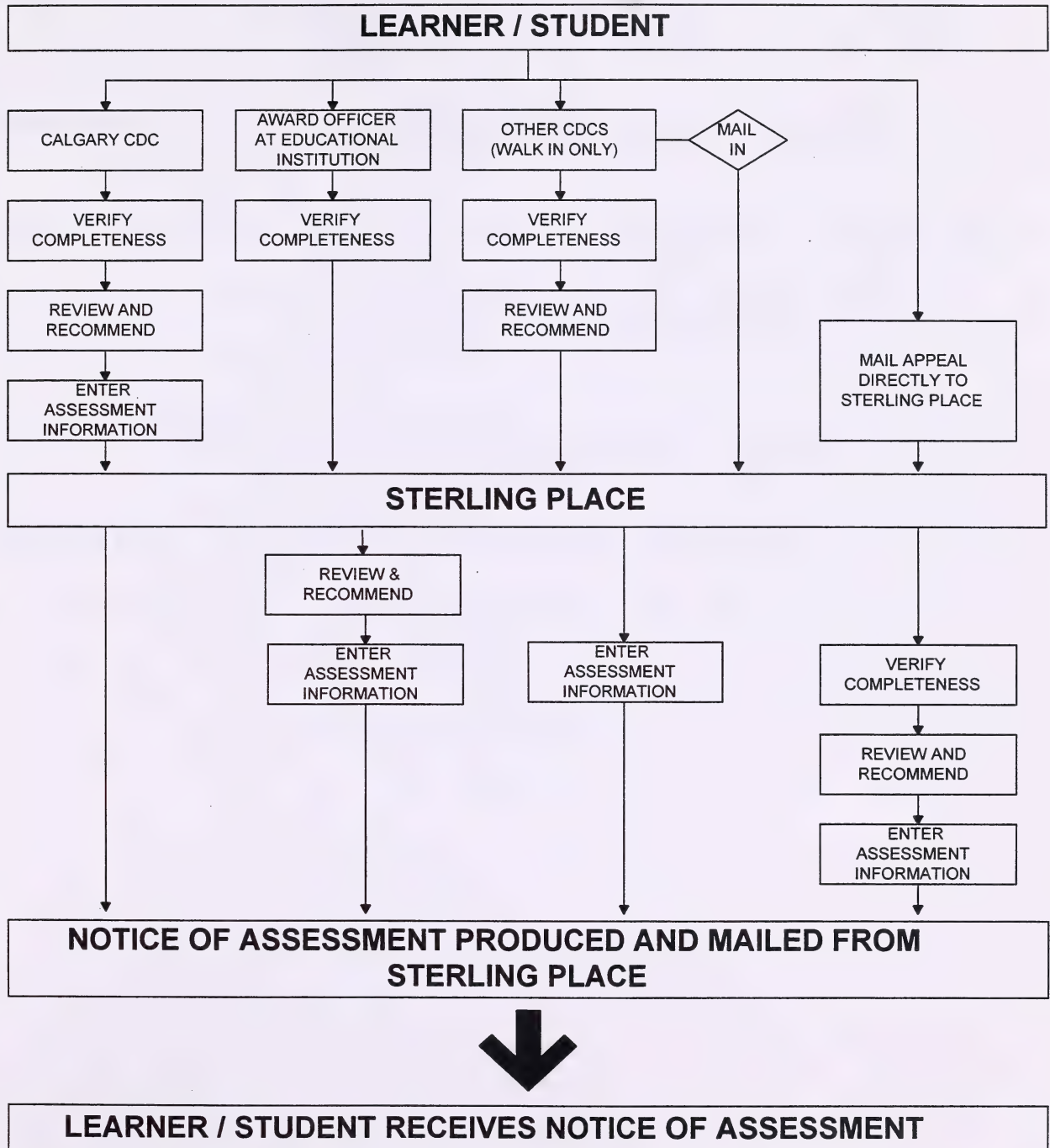
Other CDC's in the Province

- If students walk into any other CDC in the province, the Authorized Counsellor may verify the application for completeness then review it and make a recommendation.
- The application will then be forwarded to Sterling Place for processing.
- If students mail in their appeal application forms to any CDC, those forms should simply be forwarded to Sterling Place and the entire review and processing will take place here.

Sterling Place

- Students will still have the option of mailing their appeal applications directly to Sterling Place.
- Once here, the review and processing will be handled here.

APPEAL PROCESS



NOTE:

FOR APPEALS THAT ARE REVIEWED BUT DENIED, A LETTER IS SENT TO THE STUDENT RATHER THAN A NOTICE OF ASSESSMENT

Appeals

- If a student feels that their financial situation has not been given fair consideration, they may send in an appeal request. The appeals are carefully reviewed and if it is possible to do so, the award will be adjusted.

Appeal Forms

- Appeal forms are available from Students Finance offices, Career Development Centres and Awards Offices at schools.

Reduction Codes

- These numeric codes explain the reason(s) for the reduction in the student's award. These codes are listed on the top right hand corner of the Notice of Assessment. When students appeal they must address the reasons that their awards were reduced. Explanations of these codes appear on the back of the Notice Of Assessment. (See Appendix)

Required Documentation

- It is the student's responsibility to send in any documents or receipts which help to prove a need for additional assistance. These documents should be attached to the appeal form.

Processing Time

- Appeals may take up to 6 weeks to be processed.

INFORMED CHOICE APPEAL PROCESS

Appeal

When a client has been denied eligibility due to the informed choice process for the Skills Development Program, the Authorized Counsellor (AC) must inform applicants of their right to appeal, the appeal process, and the time limit for appeal.

The appeals process places as much responsibility as possible for completion on the client. Although assistance with the process will be available through the Authorized Counsellor, it is left to the client to provide documentation, further information and completion of the **Notice of Appeal** form.

Timelines

Acceptable standards should give the client 30 days from receiving a rejection in which to appeal the decision, and delivery partners 5 working days from receipt of an appeal to respond to the client. Where an appeal can be processed in a shorter time, this should be achieved. Where clients are faced with early school start dates it is the client's responsibility to appeal as quickly as possible.

Appeal Process

The process for the SDP Appeals Mechanism involves three levels of appeal.

Level One Appeal

- The client must complete the Notice of Appeal form, supply any relevant documentation and submit the completed form and documentation (appeal package) to the office where the original decision was made. First level appeals will be considered by the same office where the initial decision was made.
- The appeal will be forwarded to the manager or supervisor of the counsellor who made the original decision.
- The manager or supervisor will review the information and make a decision.
- Should the appeal be approved, the manager/supervisor will sign the original application and forward it to Students Finance and notify the client of the approval.
- Should the appeal be denied, the manager/supervisor will indicate the reason on the appeal form and notify the client in writing of the outcome.
- The client will then have an additional 30 days in which to pursue a second appeal.

Level Two Appeal

Documentation Required

Clients are required to submit a formal letter of appeal to the manager/supervisor:

- Outlining the nature of their appeal
- Why they believe the first level of appeal was not satisfactory, and including any relevant documentation

The appeal package is submitted to the office where the original decision was made.

District Office/CDC/AVC Responsibilities

First level appeal documents and second level appeal documents (see checklist on next page) are forwarded to Students Finance. Members consider and decide each appeal. Results of each appeal will be forwarded to the appropriate local manager by the committee secretary.

Where a second level appeal is not approved, the manager/supervisor in the local office sends a letter to the client on behalf of the appeals committee, notifying the client of the outcome.

Appeals Committee

This committee is comprised of representation from all three delivery partners and a secretary to the committee. It does not include the student. The committee will be contacted by Students Finance. Students Finance will coordinate the distribution and scheduling of meeting.

- The committee meets on an ad hoc basis
- The committee hears appeals by conference call

Level Three Appeals

The Level Three appeals process involves the existing Students Finance Public Appeals Committee (PAC).

- If a client has been turned down at the second level of appeal, the client may pursue an appeal involving the public appeals committee.

The Client

- Provides a letter for the Students Finance PAC, including any new information which may affect the appeal.
- Gives the letter to the originating office for forwarding to the PAC.

Local D.O. CDC, or AVC

The originating office forwards the letter to the SF PAC secretariat.

PAC Secretariat

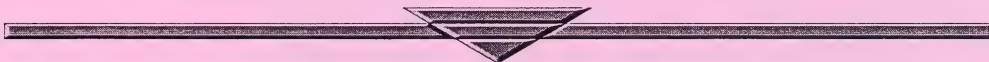
Notifies the client in writing of the date and time of the appeal, with a copy to the originating office. When the decision is made, the PAC secretary will notify the client of the decision.

2ND LEVEL APPEAL CHECKLIST

- ☐ Original or readable photocopy of complete Students Finance application and appropriate schedules
- ☐ Educational Planning Questionnaire
(If not already forwarded to Students Finance)
- ☐ Transcripts or latest statement of marks (if appropriate)
- ☐ Correspondence information and rationale that was considered by Authorized Counsellor or 1st level review
- ☐ Letter(s) of notification to client of non-approval from Authorized Counsellor or reviewer.
- ☐ Client's Appeal Letter (signed)
- ☐ Any other Documentation which is relevant to the appeal (ie. release of information documents)

SECTION SIX

DESIGNATION OF SCHOOLS/PROGRAMS



DESIGNATION AND CERTIFICATION OF PROGRAMS

Designation Criteria

Authorized Counsellors must check with Students Finance to ensure that the institution and program the student has chosen is designated for funding.

Designation of Private Providers of Basic Foundation Skills Programs

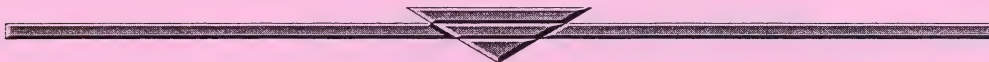
- Effective April 1, 1995, schools offering basic foundation skills programs were notified that they had to have their programs certified by Alberta Advanced Education and Career Development. The department developed standards and procedures for certifying basic foundation skill programs offered by private providers.
- Designation of private providers is based on certification.
- Certification of private providers is done on an annual basis.
- Certification in one year does not ensure future certification.
- When a school fulfills the requirements for certification, Licensing and Certification advises Students Finance and the designation is then approved, based on the specific terms of the certification.
- Students Finance will process applications for certified programs only.

Types of Certification

- There are **two types** of certification that can occur for the programs at these schools:
- Some programs are approved so that students can receive assistance with tuition, books and supplies and living costs.
- Other programs will be approved so that students can receive assistance with books and supplies and living costs only (not tuition).
- Each school (as it is certified) will be told what the restrictions are (e.g., how many students it can have and/or the maximum amount of tuition the government will pay to the school). This can vary significantly (e.g., 10-150 students).

SECTION SEVEN

AUDIT AND SPECIAL INVESTIGATIONS



GENERAL INFORMATION

Student Responsibility

- Students **should not make a false or misleading statement** on their application. False or misleading statements may result in **suspension of funding and prosecution.**

***IMPORTANT NOTE:** 100% of applications are subject to **audit.**

Documentation

- **Students must keep** their records and receipts including:
 - rent receipts and leases
 - child care receipts
 - bank and employment records for student and their spouse
 - medical documentation

Changes in Information

- After submitting an initial application, **students must advise** Students Finance in writing of any changes due to the following:
 - Changes in financial estimates including summer, part-time or spousal earnings
 - Changes in declared sources of income, savings or assets/investments
 - Any additional sources of income, including non-taxable sources of income (e.g., gifts, inheritances), not previously declared
 - Changes in academic or marital status
 - Changes of name (including appropriate documentation) and/or address

AUDIT PROCESS

Who Gets Audited?

- Students Finance audits many students each year to ensure accuracy of submitted information and to verify the eligibility to receive assistance. Audits are done because of random selection, informants' calls or computer matching with other agencies.

Sequence of Events

- 1) Letter goes to student informing him/her of audit and necessary documents that must be supplied:
 - Student has 30 days to respond
 - If no response, a second letter goes out, allowing a further 15 days
 - If still no response, a third letter is sent, advising remaining funds will be frozen
- 2) When student responds, a reassessment is done:
 - At this point most students clear audit
 - A letter is sent advising the student of this fact
- 3) If student does not clear audit:
 - Funds are cancelled or reduced
 - A letter and a revised Notice of Assessment are sent to the student

Audit Appeals

- A student may appeal audit results by supplying a written explanation and supporting documents.
- If the student is still dissatisfied, he/she may have their appeal forwarded to the Students Finance Public Appeals Committee.

SECTION EIGHT

WORKING TOGETHER

• CONTACT PHONE NUMBERS



Important Changes for 1996/97

- A full range of information and counselling services concerning student funding will be available at local Career Development Centres starting May 1, 1996. This includes information on the status of a student's application and award.
- The CDC's now have access to Students Finance information systems and will be able to provide that information to students and delivery partners throughout the province.
- Students and delivery partners now do not have to rely on Edmonton and Calgary Students Finance offices for service and information.

EDMONTON - STERLING PLACE

Edmonton Counsellors 427-5540

- Counsellors can assist delivery partners, students and schools with problems associated with individual Students Finance applications.
- **Please Note:** These services will be available in Edmonton at Sterling Place only until **September 30, 1996**. Front-line staff will then be relocated to the Edmonton CDC and there will be no public entry or phone service available at Sterling Place. The automated phone service will continue to be available province-wide, 7 days a week and 24 hours a day.

Edmonton Manager 427-5540

- Joan Duhig, Manager, Client Services North (North of Red Deer)

Other Edmonton Contacts

Information	427-2740
Toll-Free Line (Automated Service Only)	1-800-222-6485
Audit and Special Investigations	427-5560
Alberta Heritage Scholarship Fund	427-8640
Fax Line	422-0091

CALGARY

Calgary Counsellors

Social Insurance Number

1,2,3,4,5*

0,6,7,8,9*

Counsellor

Shyrose Allidina **297-7771**

Laura McKenzie **297-5025**

*Refers to third last digit of SIN

Calgary Manager

297-3334

- Shirley Steele, Manager, Client Services South (Red Deer and South)

Other Calgary Contacts

General Information and Status Line

297-6344

FAX Line

297-6235

Note: Alberta residents with no RITE access may call 310-0000 and the operator will route their call to the nearest RITE Centre

***NEW**

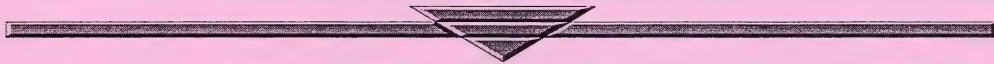
Field Support Unit Sterling Place, Edmonton

427-7151

- The Field Support Unit can assist delivery partners and schools **(province-wide)** with questions relating to program and policy clarification, forms and supplies.

SECTION NINE

GLOSSARY OF TERMS



AVC

- Alberta Vocational College

AFSS

- Alberta Family and Social Services

Basic Foundation Skills

The skills that help you get and keep a job or go on to further training. This includes programs such as:

- Academic upgrading (Grades 10-12)
- Adult Basic Education (Grades 7-9)
- Literacy and Numeracy
- English as a Second Language (ESL)
- Pre-Careers Academic Training
- Pre-Technology Training
- University and College Entrance Preparation (UCEP)

CASC

- Canada Alberta Service Centre

CDC

- Career Development Centre

Certificate of Achievement

Awarded to high school students who complete the Integrated Occupational Program (IOP). To earn this certificate, students must complete:

- A minimum of 80 credits in designated core and occupational courses. (IOP courses are numbered 16-26-36).
- Students may transfer from the certificate of achievement route to the Alberta High School Diploma route. The credits earned in IOP may be applied toward an Alberta High School Diploma.

College Prep

- Academic upgrading courses offered by several post secondary institutions
- Often, these courses may not be recognized as equivalent to Department of Education sanctioned courses by schools other than the offering post-secondary institution.
- May limit student to one post-secondary institution

Core Courses

At the academic upgrading level, core course include:

- English
- Social Studies
- Mathematics
- Science
- Biology
- Chemistry
- Physics
- In addition to these core subjects, courses may be selected from other subjects that are pre-requisite to meeting the career goal. These may include subjects such as: CALM, reading, keyboarding, computer literacy, accounting, a second language

ECSS

- Employment and Client Support Services worker

EI

- Employment Insurance formerly U.I.C.

G.E.D.

- General Educational Development
 - a) Social Studies
 - b) Science
 - c) Writing Skills and the Arts
 - d) Interpreting Literature
 - e) Mathematics
- The GED examinations reflect only a selection of general educational skills; they do not address subject matter in specific course and disciplinary areas.
- GED may not be accepted for entrance to public post-secondary institutions.
- Students need to determine acceptance of GED for their chosen studies.
- GED is generally accepted for private vocational schools
- Employers do not have much knowledge of GED.

Grade 12

Provides the student with an Alberta High School Diploma. To achieve this the student must:

- Earn a minimum of 100 credits
- Complete and meet the standards of the following courses:
 - English 30 or 33 or French 30
 - Social Studies 30 or 33
 - Mathematics 20 or 23 or 24
 - Science 20 or 24 or Biology 20 or Chemistry 20 or Physics 20

High School Equivalency Diploma

- Complete and meet the standards of the following:
 - Physical Education 10 (3 credits)
 - Career and Life Management (CALM) 20 (3 credits)
 - 10 Credits from career and technology studies or fine arts or second languages
 - 10 Credits in any 30 level courses (including locally developed) in addition to English 30 or 33 and Social Studies 30 or 33.
- Alternative to writing the GED
- Suitable for persons 18 years or older who are deficient in credits for an Alberta High School Diploma and have been out of school for at least ten consecutive months
- Application made to the principal of the high school in their community
- Principal forwards letter of recommendation to the Student Evaluation Branch, 11160 Jasper Avenue, Edmonton, AB T5K 0L2

To gain a High School Equivalency Diploma through this alternative program, a candidate shall obtain 100 school credits as set forth below:

1. A minimum of 60 credits must be gained through classroom instruction, in a school or other institution accredited by Alberta Education, offering approved senior high school courses, as follows:
 - a) A high school course in mathematics 5 credits
 - b) A high school course in science 3 credits
 - c) English 30 or English 33 5 credits
 - d) One other Grade 12 course 5 credits
 - e) Additional high school courses 42 credits
2. A minimum of 40 additional credits, which must be earned as follows:
 - a) Additional high school courses
 - b) Additional approved adult education courses under recognized agencies (e.g. public colleges, institutes of technology, extension divisions of universities, adult evening classes), and/or
 - c) a maximum of 15 credits for maturity, according to the following scale:

Age 21 - 24 inclusive	5 credits
Age 25-29 inclusive	10 credits
Age 30 and over	15 credits
 - d) A maximum of 5 credits for extensive travel
 - e) A maximum of 5 credits for extensive reading or private study

HRCC

- Human Resources Centre of Canada (formerly Canada Employment Centre)

Language Instruction for Newcomers to Canada (LINC)

- Federal government program (Citizenship and Immigration Canada)
- The LINC program provides basic language instruction
- A Client can take LINC if they are eligible for the program and if they are a permanent resident or a refugee work claim has been accepted
- Canadian citizens are not eligible for LINC funding

Mature Student

- A mature student is an applicant to a post-secondary institution who does not possess a high school diploma or does not have the minimum number of high school credits as stated in the post secondary institution's calendar for entrance to a specific program. Under SDP, students should receive funding for courses needed to access post secondary training as a mature student.

Pre-Careers

- Offered at SAIT for academic preparation into SAIT's career programs
- Does not give high school diploma or equivalency
- Some SAIT programs do not accept pre-careers as an entrance pre-requisite
- Prepares student well for continuing study at SAIT, but does not necessarily give entrance to other post-secondary institutions

Pre-Technology/ Pre-Business

- Offered at NAIT for academic preparation into NAIT's technical and business programs
- Some NAIT programs do not accept pre-tech or pre-business as pre-requisite
- Does not give high school diploma or equivalency
- Does not necessarily give entrance pre-requisites for other post-secondary institutions

SFI

- Supports for Independence

U.C.E.P.

- University and college entrance program
- Fast-track program offered to students to achieve entrance eligibility to Alberta post-secondary institutions
- Covers core subjects of Grade 10-12 in one year
- If successfully completed gives a high school equivalency but not a high school diploma
- Students need to be motivated with few distractions to successfully complete the challenges of UCEP
- Employers do not have much knowledge of UCEP

VRDP

- Vocational Rehabilitation for Disabled Persons

SECTION TEN

APPENDIX

- **GUIDE TO ASSESSING APPLICANT READINESS**
- **EMPLOYABILITY SKILLS PROFILE
(The Conference Board of Canada)**
- **SECTION 2 - UPGRADING BASIC
FOUNDATION SKILLS APPLICATION**
- **EDUCATIONAL PLANNING
QUESTIONNAIRE**
- **TRAINING PLAN SUMMARY**
- **APPLICATION - ALBERTA HEALTH CARE
PREMIUM SUBSIDY**
- **APPLICATION - ALBERTA BLUE CROSS**
- **NOTICE OF ASSESSMENT**



**GUIDE TO ASSESSING APPLICANT READINESS
for Training
Academic Upgrading / Basic Foundation Skills**

This form is intended for client file purposes only and does not constitute any part of the documentation requirements of the funding application. This is a "tool" for counsellors to help assess the level of applicant readiness and may lead to an appropriate action plan to address readiness issues before recommending training.

Applicant's Name: _____ S.I.N. _____
Last First

Authorized Counsellor: _____ Date: _____
Print Name

To be eligible for grant funding there are 4 main areas of criteria: 1) Essential Need; 2) Financial; 3) General; 4) Informed Choice

Indicators	Met		Indicators	Comment
	Yes	No		
1. ESSENTIAL NEED Is School essential for employment? <ul style="list-style-type: none"> • Full-time study vs. part-time study • Are there better routes to employment? • Has a High School Diploma 	—	—	4. INFORMED CHOICE a) Ready, Willing and Able <ul style="list-style-type: none"> • good physical health • appropriate personal care / hygiene • no alcohol / substance dependency • good mental health • realistic about self • able to prioritize activities • good family health • good family emotional health • support from family / friends • good money management skills • child care arranged • accommodation arranged • transportation arranged • clear educational goals • academic capacity to reach goals • motivated toward learning / goals • study skills developed 	
2. FINANCIAL Does applicant appear to need financial aid? Has applicant applied for any form of financial assistance? (e.g. UIC; WCB; VRDP, Band, etc.) <ul style="list-style-type: none"> • Is documentation attached? 	—	—	b) Labour Market Destined <ul style="list-style-type: none"> • sees training as a means to employment • positive attitude toward their potential work 	
3. GENERAL a) Adult <ul style="list-style-type: none"> • 18 years or older • under 18, legally married • under 18, non-SFI single parent 	—	—	c) Career Planning (for those applying for high school upgrading) <ul style="list-style-type: none"> • has completed a career plan • realistic assessment of: <ul style="list-style-type: none"> - skills - abilities - interests - employment goals • chosen occupational goal is realistic • understands employment expectations & working conditions 	
b) Out of public school one year or <ul style="list-style-type: none"> • F&SS dependent turning 18 • Student at risk 	—	—		
c) Alberta resident for 12 months or <ul style="list-style-type: none"> • SFI recipient 	—	—		
d) Unemployed <ul style="list-style-type: none"> • without paid work 6 of last 12 months or • employed less than 25 hours per week 	—	—		
e) Unskilled <ul style="list-style-type: none"> • work requiring the skills possessed by the applicant is eliminated due to labour market restructuring or • unable to be actively employed for the last 2 years in their skill area or • has formal skill training of less than 3 months or • authorized counsellor justification and rationale of Labour Market circumstances including reasonable expectations for client mobility 	—	—		

Comments: _____

Employability Skills Are Critical

Employability skills are the generic skills, attitudes and behaviours that employers look for in new recruits and that they develop through training programs for current employees. In the workplace, as in school, the skills are integrated and used in varying combinations, depending on the nature of the particular job activities.

The Council recognizes the need for employers to accommodate individual differences and to provide equal opportunities for women, native people, visible minorities and people with disabilities.

How Are Employability Skills Developed?

Employability skills are developed in school and through a variety of life experiences outside school. The student, the family and the education system, supported and enhanced by the rest of society, share this responsibility.

How Does This Profile Fit with the Goals of Education?

All the skills listed in this profile are already either explicit or implicit in general educational goal statements of the provinces and territories. Drawing attention to skills necessary for employability is compatible with and can enhance a school's efforts to meet its other goals and objectives.

Corporate Council on Education

Core Purpose:

We are a catalyst to engage business and education in partnerships that foster learning excellence to ensure that Canada is competitive and successful in the global economy.

Member companies 1990-96

AGT Limited
Air Canada
Atlantic Canada Telephone Companies
Island Tel
Maritime Tel & Tel
NB Tel
Newfoundland Telephone
Atomic Energy of Canada
Bank of Montreal
Bell Canada
BP Canada Inc./Talisman Energy Inc.
British Columbia Hydro & Power Authority
British Columbia Telephone Company
Canada Post Corporation
Canadian Microelectronics Corporation
Canadian Occidental Petroleum Ltd.
CP Rail System
Dofasco Inc.
General Electric Canada Inc.
General Motors of Canada Limited
IBM Canada Ltd.
Imasco Limited/Pharmaprix
Imperial Oil Limited
Inco Limited
Laurentian Financial
National Defence
Noranda Forest Inc.
Norcen Energy Resources Limited
Northern Telecom Limited/Bell-Northern Research Ltd.
Power Corporation of Canada
Royal Bank of Canada
Shell Canada Limited
Syncrude Canada Ltd.
Teleglobe Canada Inc.
TransAlta Utilities Corporation
TransCanada Pipelines Limited
Xerox Canada Ltd.

Également disponible en français.

01/96

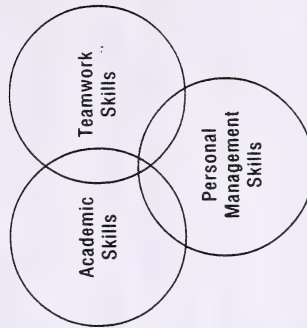


The Conference Board of Canada
255 Smyth Road, Ottawa, Ontario K1H 8M7
Canada
Telephone: (613) 526-3280
Fax: (613) 526-4857

Information for Sound Decisions Since 1954

Employability Skills Profile

What Are Employers Looking For?



The academic, personal management and teamwork skills outlined in this profile form the foundation of a high-quality Canadian workforce both today and tomorrow.

The Corporate Council on Education invites and encourages students, parents, teachers, employers, labour, community leaders and governments to use the profile as a framework for dialogue and action.



The Conference Board of Canada

EMPLOYABILITY SKILLS PROFILE: The Critical Skills Required of the Canadian Workforce

Academic Skills

Those skills which provide the basic foundation to get, keep and progress on a job and to achieve the best results

Canadian employers need a person who can:

Communicate

- Understand and speak the languages in which business is conducted
- Listen to understand and learn
- Read, comprehend and use written materials, including graphs, charts and displays
- Write effectively in the languages in which business is conducted

Think

- Think critically and act logically to evaluate situations, solve problems and make decisions
- Understand and solve problems involving mathematics and use the results

- Use technology, instruments, tools and information systems effectively

- Access and apply specialized knowledge from various fields (e.g., skilled trades, technology, physical sciences, arts and social sciences)

Learn

- Continue to learn for life

Personal Management Skills

The combination of skills, attitudes and behaviours required to get, keep and progress on a job and to achieve the best results

Canadian employers need a person who can demonstrate:

Positive Attitudes and Behaviours

- Self-esteem and confidence
- Honesty, integrity and personal ethics
- A positive attitude toward learning, growth and personal health
- Initiative, energy and persistence to get the job done

Responsibility

- The ability to set goals and priorities in work and personal life
- The ability to plan and manage time, money and other resources to achieve goals
- Accountability for actions taken

Adaptability

- A positive attitude toward change
- Recognition of and respect for people's diversity and individual differences
- The ability to identify and suggest new ideas to get the job done—creativity

Teamwork Skills

Those skills needed to work with others on a job and to achieve the best results

Canadian employers need a person who can:

Work with Others

- Understand and contribute to the organization's goals
- Understand and work within the culture of the group
- Plan and make decisions with others and support the outcomes
- Respect the thoughts and opinions of others in the group
- Exercise "give and take" to achieve group results
- Seek a team approach as appropriate
- Lead when appropriate, mobilizing the group for high performance



The Conference Board of Canada
255 Smyth Road, Ottawa, Ontario K1H 8M7
Canada
Telephone: (613) 526-3280
Fax: (613) 526-4637

Information for *Skills Development Strategy 1994*

This document was developed by the Corporate Council on Education, a program of the National Business and Education Centre, The Conference Board of Canada.

This profile outlines foundation skills for employability. For individuals and for schools, preparing for work or employability is one of several goals, all of which are important for society.

SECTION 2 MUST BE COMPLETED BY REGISTRAR, PRINCIPAL, GUIDANCE COUNSELLOR OR INSTITUTIONAL HEAD AT THE SCHOOL YOU WILL BE ENROLLED IN DURING 1996/97 SCHOOL YEAR

SCHOOL INFORMATION

Name of School

City/Town

From

To

23 Training Dates

Day Month Year

Day Month Year

Day Month Year

Day Month Year

Day Month Year

Day Month Year

School Code

19 _____

Campus Code (if not attending main campus)

20 _____

Campus Name (if not attending main campus)

24 Student ID #

This number is essential for billing purposes.

PROGRAM INFORMATION

Costs listed should reflect amounts owed excluding other sponsorships.

Term	Name of Program	Program Level No.	No. of Courses	Payable To The Institution		Payable To The Student		No. of Months in Term*
				Tuition and/or Mandatory Fees	Student Association Fees	Book/Supply Costs (Includes Rentals)		
28 1	_____	7	_____	_____	_____	_____	_____	_____
29 2	_____	7	_____	_____	_____	_____	_____	_____

ACCEPTABLE ACADEMIC PROGRESS

Is this a continuing student at your school?

30 ☐ Yes
☐ No



Has acceptable Academic Progress been made?

31 ☐ Yes
☐ No

* Complete if ESL

32 X

SIGNATURE OF SCHOOL OFFICIAL

TITLE

DATE

PRINTED NAME OF SCHOOL OFFICIAL

TELEPHONE

APP-TYPE 1 App. Key

E

EDUCATIONAL PLANNING QUESTIONNAIRE

Last Name

First Name

Social Insurance Number

A. Background and present information

1. Previous Full-time Education (including outside of Canada)

Name of School	Outside of Canada	Highest Grade/Level Taken	Date Last Attended Month Year	Diploma/Degree/Certificate Obtained OR Number of Credits Earned	Incomplete (Mark "X" in box)
Last Junior/Senior High School		Grade [] []			<input type="checkbox"/>
College/Technical/University/Apprenticeship		Major Area of Study			<input type="checkbox"/>
					<input type="checkbox"/>
English As A Second Language (ESL)		Level/Name of Course			<input type="checkbox"/>

2. Were you sponsored by a Government agency for any training before?

☐

Yes → Name the Agency

Dates

Start

End

☐

No

Month

Year

Month

Year

3. List your last 4 jobs beginning with the current or most recent:

Occupation (Kind of work)	Employer	City/Province (Country if not Canada)	Date Started		Date Left		Full-Time Avg. Hrs./Wk.	Part-Time Avg. Hrs./Wk.	How much were you paid/hour?	Reason for Leaving
			Month	Year	Month	Year				

4. During the last 12 months, how many months did you collect Unemployment Insurance Benefits?

months

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5. How many months was the applicant employed in the last 12 months?

months

6. Were any of these jobs subsidized employment? ☐ No ☐ Yes → For how many months in the last 12?

B. Planning for work

- What is your usual work?
- What type of work will you be seeking after your training?
- How will taking this training help you reach this work goal?

C. Planning to go to school

- How do you plan to handle your budget while attending school?
- What personal arrangements have you made, so that you can do well in school? (e.g. childcare, emergency childcare, place to study). What have your family and friends agreed to do to help you return to school?

Please turn page over →

3. What will you do to make sure you will have enough time to do school work?
4. What have you started to do to develop your study skills? What will you do if you need help with your schoolwork?
5. If you need to move to attend school, how will you manage this? Can you afford to move?
6. What else do you need to do to prepare for school?

D. Planning and choosing a school

1. What school do you plan to attend?
2. Why did you choose this school?

E. Planning your funding for school

1. Have you applied for funding from another agency? Which agencies? (eg. Human Resources Development/Canada Employment Centre, Indian and Northern Affairs/Band, Workers' Compensation Board (WCB), your Immigration Sponsor, etc.)
2. If you do not get funding for school what will you do?

➡ If you are applying for ESL or Adult Basic Education (below the Grade 9 level), please read and sign the Applicant Declaration at the bottom of this page.
➡ All other students please complete the rest of this form.

F. Planning your long-term work goals

These are some basic questions about your future work goals. You may be asked to gather more information or do more career planning.

1. What tasks will you do in the work for which you are training?
2. Why did you choose this work goal?
3. What further training do you need to get this work? What high school courses are required to enter this training?
4. What is the long term forecast for this type of work? Will it be in demand in Alberta?
5. What other ways could help you to enter this type of work sooner?

APPLICANT DECLARATION

The Freedom of Information and Protection of Privacy Act says we must tell you why we are collecting this information, the specific legal authority for the collection and the name of a contact person should you have any questions about the collection of this information. We ask for this information to determine your eligibility for financial assistance for the Skills Development Program and we do so under the Students Finance Act, chapter S-24, Revised Statutes of Alberta 1980. If you have any questions about the collection of this information you may contact a Financial Aid Advisor at the Students Finance Office, 8th Floor Sterling Place, 9940 - 106 Street, Edmonton, AB, T5K 2V1, Ph. 427-2740 OR Room 401, 855-8th Avenue S.W., Calgary, AB., T2P 3P1 Ph. 297-6344.

I declare that I have planned carefully to return to school. I am ready and able to commit myself to my studies.
I consent to the disclosure of my personal information to Advanced Education and Career Development for use in research, statistical analysis, or program evaluations.

X

SIGNATURE OF APPLICANT (sign in ink)

DATE SIGNED (in ink)

Date
Day Month Year

SECTION 1

Last Name Given Name Social Insurance Number

☐ Part A - SFI Dependents Turning 18

The above named applicant is currently enrolled in your school and is turning 18 years of age on
Day Month Year

This student will receive grant funding to complete the high school program providing:

- i) the student is enrolled in a minimum of 15 credits per semester
- ii) the student continues to attend regularly and progress in all courses
- iii) the subjects in which the student is enrolled are necessary to obtain the Alberta High School Diploma

If Part A is checked, please proceed directly to Section 3

☐ Part B - Returning Adults

The above named applicant has met with an Authorized Counsellor and appears to meet the eligibility criteria for grant funding to attend full-time programming in upgrading/basic foundation skills. Funding in this program provides adult Albertans with the necessary foundation skills to enter the labour market or to pursue further education to prepare for labour market entry. This applicant is referred to:

Name of School for academic assessment and placement in:

- ☐ English as a Second Language
- ☐ Adult Basic Education (Grade 7 - 9)
- ☐ Literacy Numeracy (Grade 0-6)
- ☐ Academic Upgrading (Grades 10 - 12)

◆ (If school testing does not allow for placement in the level indicated, the school must request written approval from the Authorized Counsellor to change the placement)

For students in ESL, Literacy and Numeracy, and ABE proceed to Section 3

SECTION 2

◆ For students at the Grade 10 or higher level, courses must be selected that meet the applicant's vocational stream by the most expedient route.

Applicant's Occupational Stream/goal is

Possible future skill training is planned at

Name of School Name of Program

This section is to be completed by Career Development Centre or Educational

Students at the high school level must be enrolled in a minimum of 15 credits in 3 core courses (all of which must be required to reach the occupational goal). At least 2 of the 3 courses must be from the approved core list for any one semester. Students scheduled for 2 semesters must be enrolled in 5 of 6 courses from the approved list

English Social Studies Biology Physics
 Math Science Chemistry

◆ Actual placement into the appropriate course level is the responsibility of the school. Generally a student is funded in one sequence (ie. 10, 20, 30 or 13, 23, 33)

◆ In addition to these core subjects, courses may be selected from other subjects that are pre-requisite to meeting the career goal. These may include subjects such as: CALM, reading, typing, computer literacy, accounting, a second language

SECTION 3 - Authorized Counsellor

Comments of Authorized Counsellor

Authorized Counsellor (Please print)

Authorized Counsellor's Signature

Agency

Authorized Counsellor Code

Phone Number

Fax Number

SECTION 4 - Applicant's Agreement

I have agreed to this training plan and know that if I change my training plan, I must have the approval of an Authorized Counsellor.
I realize that my funding may be stopped if this training plan is not followed.

Applicant's Signature

Date
Day Month Year

Note to the School:

Please complete Section 7 of the applicant's Students Finance Board Application for Upgrading/Basic Foundation Skills. Should these core courses not be available, or in your view not suitable, please contact the referring Authorized Counsellor. All variations from this approved plan must be discussed and supported by the referring Authorized Counsellor or funding may be in jeopardy.



Application for Premium Subsidy

To mail correspondence:
Alberta Health Care Insurance Plan (AHCIP)
PO Box 1360 Edmonton AB T5J 2N3

For service in person:
10025 Jasper Ave Edmonton, or
703 6 Ave SW Main Floor Calgary

To telephone:
427-1432 (Edmonton)
297-6411 (Calgary)
310-0000 (Toll-free for rest of Alberta to ask
for one of the above numbers)

If you are experiencing financial difficulties, you may qualify for the Premium Subsidy program. This program may help you with your Alberta Health insurance premiums. Read the information on the back to see how premium subsidy works. Complete this application in ink and return it to our office to see if you qualify.

Account holder's personal information

Title (e.g. Mr, Mrs, Miss, Ms, Dr, Rev, Sr)		Surname		Personal health number	
First name		Middle name			
Mailing address			City		
Province	Country	Postal code	Date of entry into Canada		

Do all family members on this account have the same mailing address? ☐ Yes ☐ No
If no, please provide the family member's mailing address, full name and personal health number on a separate page.

For office use only

Effective date	Number of lives
----------------	-----------------

You are not eligible to apply if you are:

- a senior citizen. Instead, you can apply to have your Alberta Health insurance premiums reduced or eliminated through the Alberta Seniors Benefit program. (Seniors can apply for subsidy through Alberta Health for periods prior to turning 65.);
- a new or returning resident from outside Canada, who has not yet lived in Canada for 12 consecutive months;
- exempt from paying income tax for religious, charitable or communal reasons;
- a student from outside Canada who is temporarily in Canada; or
- a refugee claimant who arrived in Canada prior to January 1, 1989, who has not been granted Convention Refugee status yet.

Account holder

If you did not file a 1995 income tax return, write **No** on lines A, B, C and D and **provide reason** for not filing. Also, if you did not file, please provide total 1995 income and source of income (eg. Social assistance, unemployment benefits, etc.)

Taxable income

→ A \$ _____
(line 260 of 1995 tax return)

Non-refundable Tax Credits

B \$ _____ x 5
(line 350 of 1995 tax return
or 17% of line 335)

→ C \$ _____

If the amount on line C is
more than the amount on
line A, write zero

Adjusted Taxable Balance

Subtract C from A to get

→ D \$ _____

D \$ _____

Spouse (If you do not have a spouse, leave this section blank.)

If your spouse did not file a 1995 income tax return, write **No** on lines E, F, G and H and **provide reason** for not filing. Also, if your spouse did not file, please provide total 1995 income and source of income (eg. Social assistance, unemployment benefits, etc.)

Taxable Income

→ E \$ _____
(line 260 of 1995 tax return)

Non-refundable Tax Credits

F \$ _____ x 5
(line 350 of 1995 tax return
or 17% of line 335)

→ G \$ _____

If the amount on line G is
more than the amount on
line E, write zero

Adjusted Taxable Balance

Subtract G from E to get

→ H \$ _____

H \$ _____

Combined Adjusted Taxable Balance

J \$ _____

Add D and H

I authorize the Department of National Revenue to release my taxpayer information to the Minister of Health of the Province of Alberta. The tax information is to be used solely for the purpose of verifying my eligibility for a premium subsidy under the Alberta Health Care Insurance Plan and for no other purpose. I acknowledge that this authority is in effect for the taxation year in which I sign this form, the previous taxation year and each subsequent consecutive year for which I receive a premium subsidy under the Alberta Health Care Insurance Plan. I certify that the information given by me in this application is true and correct and that I am subject to Canadian income tax.

If family coverage, both account holder and spouse must sign this form and provide Social Insurance Numbers.

Account holder's signature	Date	Social Insurance Number	Home phone	Work phone
Spouse's signature	Date	Social Insurance Number	Home phone	Work phone



Application for Blue Cross Non-Group Coverage

To mail correspondence:

Alberta Health Care Insurance Plan (AHCIP)
PO Box 1360, Edmonton, AB T5J 2N3

For service in person:

10025 Jasper Avenue, Edmonton, or
Main Floor, 703 - 6th Ave. S.W. Calgary

To telephone:

427-1432 (Edmonton)

297-6411 (Calgary)

310-0000 (Toll-free for rest of Alberta to ask
for numbers above)

Please read the information on the back of this form before applying for
Blue Cross non-group coverage.

Applicant's personal information

Title (e.g. Mr, Mrs, Miss, Ms, Dr, Rev, Sr)		Surname		Personal health number	
First name		Middle name		Social Insurance Number	
Mailing address					
City		Province		Country	
				Postal code	
Location of residence - Complete if mailing address is PO Box, General Delivery or Rural Route					
City		Province		Country	
				Postal code	

If you have recently terminated from a group insurance plan, complete the box below.

Name of insurance company	
Previous coverage policy number	Cancellation date of previous coverage
Do you want non-group coverage to start the date previous coverage was cancelled? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If yes, this application must be received by Alberta Health within 30 days from the above cancellation date.	

Your application will be accepted if your Alberta Health premiums are not in arrears.

I apply for enrolment with the Alberta Health Care Insurance Plan as a member in the Blue Cross Non-Group Plan. I have read the information on the back and agree to pay the applicable premiums.

Signature _____ Home phone number _____

Date _____ Work phone number _____

For AHCIP office use only

V1	Year	Month	Day	Type B	Effective	Year	Month	Day	If returned by:	Year	Month	Day
Completed						Year	Month	Day				

For Blue Cross office use only

Blue Cross Coverage number

NOTICE OF ASSESSMENT
Subject To Correction

You are eligible to receive ***6830** to attend **ALBERTA VOCATIONAL COLLEGE**

Student's Name and Address

**JOHN A. STUDENT
GENERAL DELIVERY
WETASKIWIN, AB
CANADA T9A 0W6**

From **SEPTEMBER 96** To **JUNE 97**

STUDENT ID # 000106

Please write these numbers on everything you send in

Student's Social Insurance No. **999 999 999**

Appeal Reference Number **E 1111222**

Reason Code Why Your Award Was Reduced (See Reverse) **2 3**

DATE ISSUED: **04 06 96**

Type of Assistance	Amount	Disbursement Date
Your cheque(s) will be available for pick up from the REGISTRAR'S OFFICE AT YOURSCHOOL 2 banking days before the date shown below. After the second school day of the month, your cheque will be returned to our office for cancellation.		
SKILLS DEVELOPMENT GRANT	**803	SEP 01 96
\$6,030.00	**553	OCT 01 96
	**553	NOV 01 96
	**553	DEC 01 96
	**553	JAN 01 97
	**803	FEB 01 97
	**553	MAR 01 97
	**553	APR 01 97
	**553	MAY 01 97
	**553	JUN 01 97
TUITION/FEES GRANT	**400	OCT 23 96
\$800.00	**400	MAR 23 97

The tuition/fees grant will be paid to the school on your behalf. When you register, show this notice to your school.

All loan certificates not cashed must be returned to the Students Finance Office for cancellation. Please give a brief reason for return.

Estimated Gross Indebtedness to date

****0

For an actual figure check with the lending institution(s) holding your loans.

Estimated Remission Total to date

****0

Refer to booklet entitled "Financial Assistance for Alberta Students"

IMPORTANT - PLEASE READ

This award will be provided if you meet all of the conditions listed on the enclosed "Important Notice". Please read the "Important Notice" carefully.

Your first grant cheque includes \$*250 for books and supplies. Your first grant cheque of your second term includes \$*250 for books and supplies.

- ☒ Please keep this notice for your records.
- ☒ You are required to notify the Students Finance Office of any changes to your circumstances. See reverse for details.
- ☒ If you need to appeal this award, you can get appeal forms at your school or the addresses listed on the reverse.

(TURN OVER)

If your award is less than you asked for the reason is listed below:

Reduction Code	Explanation
1	Your parents' or spouse's financial resources were considered adequate to cover more of your educational expenses.
2	The Students Finance Office expects you to cover more of your costs through savings or part-time earnings.
3	Your requested monthly living allowance was higher than the amount allowed by the Students Finance Office.
4	You are eligible for Canada student loan only, because you are not considered to be a resident of the Province of Alberta.
5	You are eligible for Canada student loan only, because your institution/program is not approved for provincial aid.
6	Your eligibility has been reduced because you received excess funding during a previous period of study.
7	You have received the legislated maximum funds for your period of study. Additional funds cannot be granted by the Students Finance Office.
8	The value of your vehicle(s), as listed on your application form, was used in calculating the amount of your award.

If your circumstances change

Loan certificates cannot be transferred to other schools. If you have changed schools, please return the certificate(s) and a new Application for Financial Assistance to the Students Finance Office.

You must notify the Students Finance Office in writing of any changes from your original application. This includes:

- Changes in financial estimates including summer, part-time or spousal earnings.
- Changes in sources of income, savings or assets/investments.
- Any extra sources of income not included before.
- Changes in academic or marital status.
- Change of name (include appropriate documentation) and/or address.

How to cash loan funds

CANADA STUDENT LOAN

Once you have registered take the Certificate of Eligibility to the Registrar's office at your school. Have the Confirmation of Enrollment (Section 2) completed, then take the certificate to your lending institution. This certificate can only be cashed in Canada.

If a second disbursement is shown on your certificate, you must get a Confirmation of Enrollment (Schedule 2) from your lending institution. Have this form signed by the Registrar's office and return it to your lending institution.

Please read the back of your loan certificate for further instructions.

ALBERTA STUDENT LOAN

Once you have registered take the Certificate of Eligibility to the Registrar's office at your school. Have the Confirmation of Enrollment (Section 2) completed, then send the loan certificate to the lending institution shown on the certificate. Please read the important notice included with your loan certificate for further instructions.

Keep your loans at interest free status

- If you are continuing full-time studies and are no longer receiving Alberta student loan(s), you must reinstate your loans by filing a Form B with your lending institution(s). If you have Alberta student loans at different lending institutions a Form B must be filed at each lending institution.
- If you have Canada student loan(s), you must also file a Schedule 2 with your lending institution.
- Canada student loan(s) and Alberta student loan(s) are separate loans. Reinstating one does not automatically reinstate the other.
- For more information you may pick up a brochure at your school, lending institution or Students Finance Office in Calgary or Edmonton.

Office Addresses

Students Finance Office
6th Floor, Sterling Place
9940 - 106 Street
Edmonton, AB T5K 2V1
Telephone: 427-2740

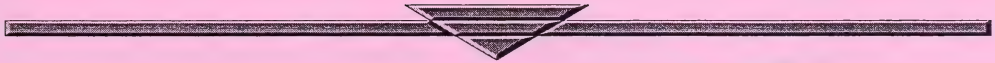
Students Finance Office
Room 401
855 - 8th Avenue S.W.
Calgary, AB T2P 3P1
Telephone: 297-6344

SECTION ELEVEN

COMMUNIQUEÉS



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